

In-tend Organiser

User Guide



e-Tendering System

April 2013

Version 3.2

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IN-TEND ORGANISER

The screenshot shows the In-Tend Home Page with the following sections:

- Project Administration:** Shows a list of the projects you are currently attached to.
- Expressions of Interest from your web site:** 1 suppliers have expressed interest in projects in the last 5 day(s).
- Supplier Returns from your web site:** 1 suppliers have submitted a return in the last 5 day(s).
- Supplier Registrations from your web site:** No suppliers have registered their details in the last 5 day(s).
- Correspondence from your web site:** No suppliers have sent correspondence in the last 5 day(s).
- Contract Administration:** Shows a list of the contracts you are currently attached to.
- View Contracts Due For Renewal:** Shows a list of the contracts which are due for renewal.
- Key Performance Indicator Schedule:** Shows a list of the Key Performance Indicators (KPI) associated with the contracts you are currently attached to.
- Auctions:** You currently have 4 live auction stages.
- Project Templates:** Displays a list of the pre-defined Project Templates i.e. Quick Quotes etc.

At the bottom, there is a navigation bar with the following items:

- Supplier Messages
- Actions
- Date: 24/11/2011 16:16:48
- Type: Return From Supplier
- DG/ Tenant: Equipment
- ITT
- Home
- Projects
- Stages
- Returns
- Contracts
- Correspondence
- Suppliers
- Help

Four numbered arrows point to specific features:

- Arrow 1 points to the title "IN-TEND ORGANISER".
- Arrow 2 points to the "Navigation Bar" at the bottom.
- Arrow 3 points to the "Supplier Messages" and "Actions" tabs at the bottom.
- Arrow 4 points to the "Recent Activities" section above the navigation bar.

All areas of the system can be accessed via the In-tend Organiser. The drop down menus located at the top of the Home Page (1) gives the user access to every area of the Organiser. This menu is often used to alter administration preferences, as well as for quick navigation to varied functions, such as creating questionnaires, reports and document sets. A Navigation Bar is also located at the bottom of the screen (2) which displays links to key parts of the system, whilst also allowing the user to refresh the screen and go back/forward. The main area found on the home screen (3) shows details of recent activities within the system, along with links to relevant sections.

Supplier Messages

At the bottom of the Home Page just above the Navigation Bar are two tabs (4)

- **Supplier Messages**, which acts as your inbox giving you further warning of recent communication from the In-Tend web site, such as new supplier registrations, expressions of interest, supplier returns and new correspondence
- **Actions**, which highlights any Actions that have been placed on users or suppliers that are due for completion or are outstanding.

Creating a Tender

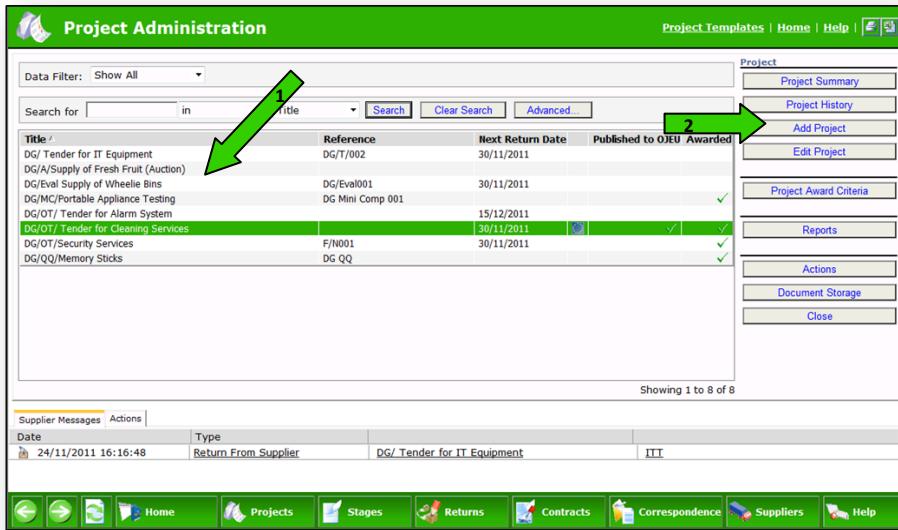
Any procurement exercise conducted through the In-Tend System is called a Project.

Searching for and Accessing Projects

There are a number of ways to navigate to Project Administration, where your list of Projects can be found and from where you begin the procurement process

- Rollover '**Project**' on the top menu and then select '**Project Administration**'.
- Click on the '**Project Administration**' link on the Home Page.
- Click on the '**Projects**' button on the menu found at the bottom of the page.

You will find this is often the case when accessing various sections of the Organiser. We will be clicking on the 'Project Administration' link found on the home page for this example:



The screenshot shows the 'Project Administration' page. At the top, there is a search bar with a dropdown for 'Data Filter' set to 'Show All'. Below the search bar is a table listing various projects. The first project in the list is 'DG/T/002' with a reference of 'DG/T/002', a next return date of '30/11/2011', and a status of 'Published to OJEU'. A green arrow labeled '1' points to the search bar. A green arrow labeled '2' points to the 'Add Project' button in the right-hand menu. The right-hand menu includes options like 'Project Summary', 'Project History', 'Edit Project', 'Project Award Criteria', 'Reports', 'Actions', 'Document Storage', and 'Close'. At the bottom of the page, there is a 'Supplier Messages' section and a row of navigation icons.

Title	Reference	Next Return Date	Published to OJEU	Awarded
DG/T/002	DG/T/002	30/11/2011		
DG/Eval001	DG/Eval001	30/11/2011		
DG Mini Comp 001				
DG/OT/003		15/12/2011		
DG/OT/004		30/11/2011		
DG/OT/005	F/N/001	30/11/2011		
DG/QQ/001	DG QQ			

Showing 1 to 8 of 8

Supplier Messages Actions

Date	Type	Message	Actions
24/11/2011 16:16:48	Return From Supplier	DG/ Tender for IT Equipment	ITI

Navigation icons: Home, Projects, Stages, Returns, Contracts, Correspondence, Suppliers, Help.

Create New Project

To create a new Project, click on the '**Project Administration**' link found on the home page. The Project Administration page allows the user to view all their projects in a table/list (1). From here, you can search for a specific project using the search bar or view details of a project by using the menu buttons found to the right hand side of the screen. We are going to create a new project, so click '**Add Project**' from the right hand side menu (2).

Add Project

The information you record in the Project setup forms the advert that is published to the In-Tend web site. Fields left blank are not shown in the web advert. Any fields that are a mandatory requirement will be highlighted in Yellow. The Project title is the first mandatory field and must be unique (1).

Reference (2) If the reference is *greyed* out the system has been configured to generate an automatic reference number otherwise the user may enter a reference number onscreen.

If the project is OJEU related, certain information will be pulled through onto the OJEU form.

You can only click the OK button on the New Project window when you have completed filling in all the mandatory information. (Once you have pressed '**OK**', you are able to go back and edit the Project to

New Project

Details Type Award CPV Description Pre Qual Standard Timescales Notes Template Details Classification Customer Website

Project

Title **Security Services Tender** 1

Reference 2

Main project sponsor, customer or department

Procurement

Main contact

Damian Gillott

OJEU notice (when known)

Date OJEU notice 17/04/2013

Allow suppliers to request documents until 3

Workflow

Show workflow pipeline on project summary

Associated Project

Is this project associated with another project? (None)

Show associated projects on summary page

OK Cancel

You should only click the "OK" button after working through the tabs and after completing the final tab [Website]

Complete all the relevant tabs (details on following pages) **across the top of the 'New Project' screen**, once completed click the '**OK**' button to save your updates and create the Project.

The Project will appear in the Projects Administration window (but will not have been published to the supplier site).

When you get to the point where you are publishing your project to the supplier website, the project will stay visible on the supplier website until the date you entered in the '**Allow supplier to request documents until**' date field (3).

The date in this field automatically defaults to the date the project is created. Therefore you must ensure you enter a date in the future (usually the date of the closing date of the 1st stage). If you do not put a date in the future, the project will be removed from the web site and suppliers will not be able to view the information!

Allow suppliers to request documents until
11/03/2011 

The Details Tab



Details Type Award CPV Description Pre Qual Standard Timescales Notes Template Details Classification Customer Website

Project title: (Mandatory Field)

Enter the title that you wish to give your project (The Project will save in 'Project Administration' against the title)

Reference:

A reference number you may have for the project.

Project sponsor customer or department:

This is the customer /department the project is being administered for. When the project is first created, this field will contain your company's default customer. To change the customer, open the drop-down list of available customers and select the required customer from the list. (Click on the '**Green icon**' to be able to add to the Customers list or this can be done centrally through the '**Lookup Tables**', which can be found in the top navigation bar under '**Administration**')

Main contact:

Enter the name of the person the suppliers will need to contact regarding the project.

OJEU notice (when known):

Enter the OJEU Notice reference. The date of the notice is entered in the associated date field, which defaults to today's date when the project is created. A new date can be inserted by checking the box next to the date field or by activating the calendar icon next to the date.

Allow suppliers to request documents until:

Enter the expiry date for expressions of interest/request for documents. When this date is reached, the project will be automatically removed from the current tenders list on your supplier web site.

The Type Tab



- **Process** – Choose from drop-down
- **Directive** – Choose option from drop-down
- **Procedure** – Choose option from drop-down

If the option isn't in the drop-down list, you can add one by clicking the green icon found to the right of the option box. The '**Project creation date**' can also be entered if different to the default setting.

Note: When the project is first created, these fields contain your company's default, to change these select a different option from the drop-down list associated with the field.

The Award Tab



Project award criteria checkbox

Tick this checkbox if you wish to set up award criteria. When the checkbox is ticked, the other fields on the tab become enabled and you are able to enter the relevant percentages against the criteria chosen, which must total 100%. You are able to choose whether the supplier can view the Award Criteria as part of the published project in the Web Site tab.

There are ten criteria fields available.

The user can customise up to ten award criteria in the '**Lookup Tables**' section of the Organiser (for further details see the Advanced Tendering Guide).

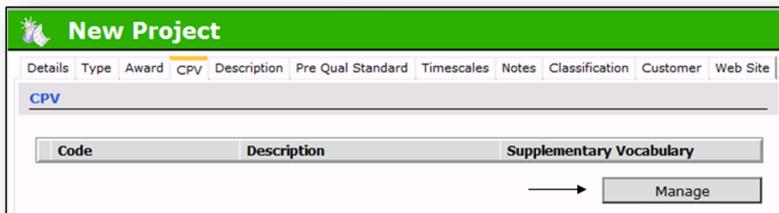
Please Note: The award criteria here is for information only. It does not form any part of the calculation process for the e-Evaluation module.

The CPV



Common Procurement Vocabulary:

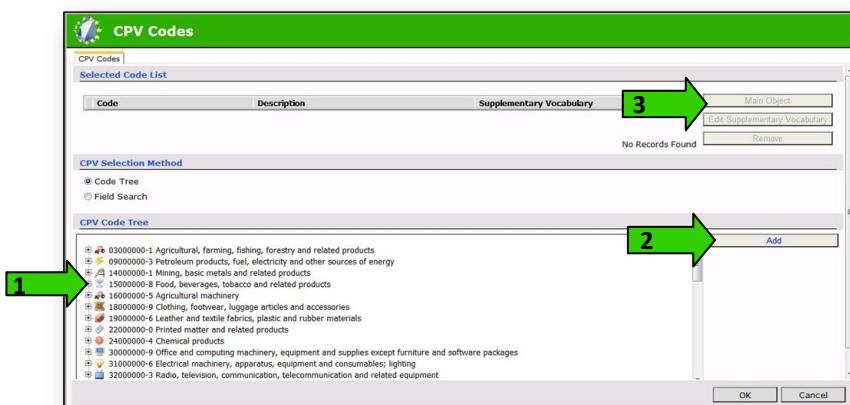
Clicking on the '**Manage**' button will open a new window which will allow you to search a list of CPV codes.



There are two search options, the **Code Tree** or **Field Search**.

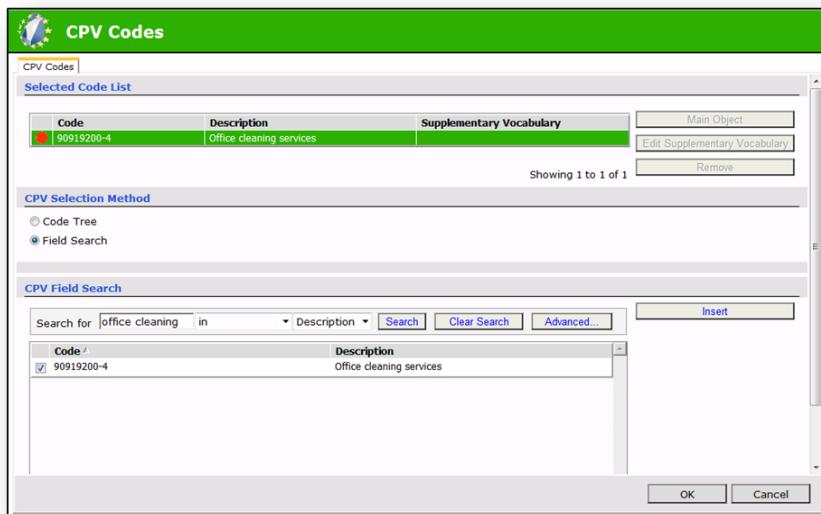
Code Tree

To use the code tree, click on the '+' signs to expand through the tree (1) until you have reached the required code. Select the required code and then click '**Add**'* (2) to insert the codes to the 'Selected Code List'. Repeat this for all the required codes. You can edit the 'Main Object' by selecting the code and clicking '**Main Object**' (3). Once done, press '**OK**', this will pull through the selected codes into the 'New Project' window. (*If you forget to press '**Add**' and only click on '**OK**', it will lose your search and you have to go through the process again).



Field Search

To search, select the '**Field Search**' button. The search allows you to enter a key word which will then bring up all the codes with that word in the description. Select the requested codes and press '**Insert**', before pressing '**OK**'.



The Description Tab (Mandatory Field)



The supplier will see the text entered in this field as the Description of the project on your supplier web site. You can insert standard text by using the '**Standard Text**' button (1), which will take you into a new screen. Click '**Insert**' to pull through existing text into your project or '**Add**' to create new text. (See the 'Advanced Training Guide' for further details of how to set up Standard Text)

Synopsis: - A file attachment to support the description

Click the '**Add**' button (2) to navigate to the synopsis document and browse your network. Link the document to the project by clicking the '**OK**' button on the Add Document dialog. The '**View**' buttons enables you to view the synopsis document from within the project and the '**Remove**' button will remove it from the Project.

New Project

Details Type Award CPV **Description** Pre Qual Standard Timescales Notes Template Details Classification Customer Website

Description

[INSERT TEXT] are currently out to tender for the provision of [INSERT TEXT]

Suppliers that would like to take part in this tender process are invited to "Express Interest" upon which the will be given access to the full tender documentation delivery through this e-tendering system.

When the tender documents have been made available involved suppliers will receive notification via email and the tender documents can be accessed from the "My Tenders" area of this website and selecting the "View Details" button of this project.

Expressions of interest will only be accepted until [INSERT DATE HERE] and the deadline for submissions of the tender will be [INSERT DATE HERE].

Please allow sufficient time to make your return as late returns will not be permitted.

Any questions relating to this tender should be made via correspondence on the website and can be addressed to the main contact as shown in the details above.

Synopsis

Standard Text

1

2

The Pre Qual Standard Tab

Details Type Award CPV Description **Pre Qual Standard** Timescales Notes Template Details Classification Customer Website

Pre-Qualification Standard:

The supplier will see the text entered in this field as the Pre-Qualification requirements of the project on your supplier web site. You can insert standard text by using the '**Standard Text**' button.

The Timescales

Details Type Award CPV Description Pre Qual Standard Timescales Notes Template Details Classification Customer Website



Use the calendar control or enter dates manually to enter the contract timescales for this project. This defaults to today's date when the project is created. Check the tick box next to the date if you wish the date to appear on the supplier web site advert.

Contract award date	<input type="text"/> 11/03/2011 
Contract start date	<input type="text"/> 11/03/2011 
Contract end date	<input type="text"/> 11/03/2011 
Contract extension date	<input type="text"/> 11/03/2011 
Contract value	<input type="text"/>

The 'Contract value' field is a free text field and allows you to give an indication of the contract value if applicable. You can insert standard text by using the '**Standard Text**' button.

The Notes Tab

Details Type Award CPV Description Pre Qual Standard Timescales Notes Template Details Classification Customer Website



Use this to enter any notes relating to the project. You can insert standard text by using the '**Standard Text**' button.

Template Details

Details Type Award CPV Description Pre Qual Standard Timescales Notes **Template Details** Classification Customer Website



Template Details allows access to user created fields that can be used within the project that are saved against a template. These can either be internal fields (*useful in reporting*) or set to public / private (*indicating whether the field can be seen in the public or private part of the supplier portal*). *User created fields must be saved against a template in order to be used.*

Select the template name from the list within the dropdown and the associated fields will be available onscreen.

(Details about creating user defined fields & templates can be found on page 71)

New Project

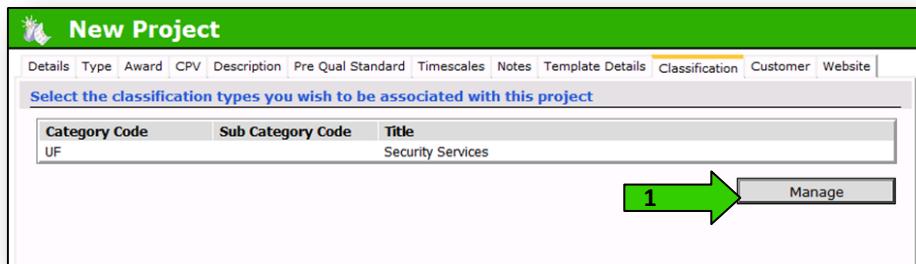
Details Type Award CPV Description Pre Qual Standard Timescales Notes **Template Details** Classification Customer Website

Details

Template	Final Award Value / Questions cut off - Template
Final Award Value	<input type="text"/> Enter the final value of the awarded tender
Clarification Question Cut Off Date	17/04/2013

OK **Cancel**

The Classification Tab



The screenshot shows the 'New Project' interface. At the top, there is a navigation bar with tabs: Details, Type, Award, CPV, Description, Pre Qual Standard, Timescales, Notes, Template Details, Classification (which is highlighted in yellow), Customer, and Website. Below the navigation bar, a section titled 'Select the classification types you wish to be associated with this project' contains a table. The table has three columns: 'Category Code' (UF), 'Sub Category Code' (Security Services), and 'Title' (Security Services). At the bottom right of this section is a green arrow pointing to a 'Manage' button, which is also highlighted with a green box and labeled with the number '1'.

By using the Classification codes you are able to run reports for Projects linked to the category codes or send an automatic alert to suppliers that have registered against the business code that a new opportunity is available (subject to this function being switched on).

To set up one or more 'Business Classifications' for your project, click on the '**Manage**' button (1). This opens the Project Classification view. Enter a key word in the Search facility to locate the classification(s) you wish to attach. Tick the classifications you require from the search results then select the '**Insert**' button to add them to the 'Selected Classification List'. Finally click the '**OK**' button to add them to your project. When the screen refreshes, the selected classifications will be displayed on your Classification tab. *This is very similar to the entering of CPV codes.*

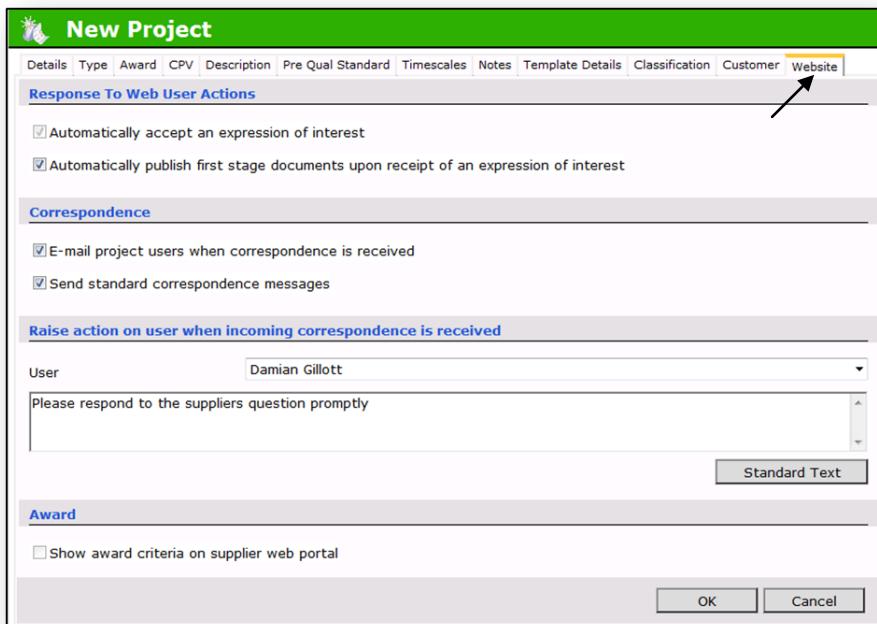
The Customer Tab



The screenshot shows the 'New Project' interface. At the top, there is a navigation bar with tabs: Details, Type, Award, CPV, Description, Pre Qual Standard, Timescales, Notes, Template Details, Classification, Customer (which is highlighted in red), and Website. A red arrow points to the 'Customer' tab.

Use this to attach any further customers or departments to the project (you will already have chosen the lead department in the 'Details' tab. You only need to select further departments in this tab if you are running a tender on behalf of

The Web Site Tab



New Project

Details Type Award CPV Description Pre Qual Standard Timescales Notes Template Details Classification Customer Website

Response To Web User Actions

Automatically accept an expression of interest

Automatically publish first stage documents upon receipt of an expression of interest

Correspondence

E-mail project users when correspondence is received

Send standard correspondence messages

Raise action on user when incoming correspondence is received

User: Damian Gillott

Please respond to the suppliers question promptly

Standard Text

Award

Show award criteria on supplier web portal

OK Cancel

Automatically accept an expression of interest:

By selecting the tick box next to 'Automatically accept an expression of interest', any supplier will automatically be accepted into the tender process when they express interest in a project found on the supplier site.

Automatically publish first stage documents upon receipt of an expression of interest:

By selecting the tick box next to 'Automatically publish first stage documents upon receipt of an expression of interest', any supplier who expresses interest in a project found on the supplier site will automatically be sent the documents from the first stage of the tender (e.g. PQQ).

E-mail project users when correspondence is received:

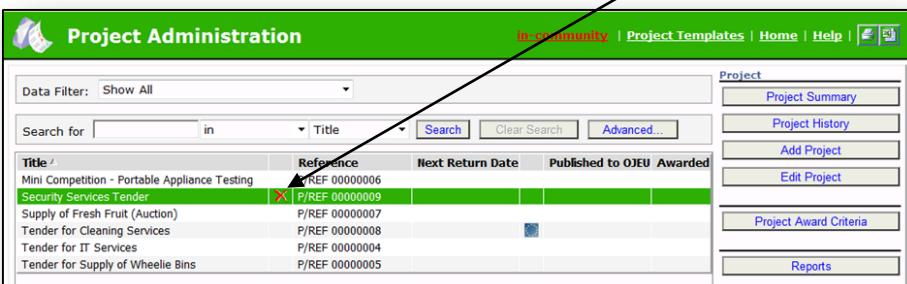
By selecting the tick box next to 'E-mail project users when correspondence is received', the user will be sent an email to their work/personal email address when any correspondence is received regarding the project.

Website tab continued

Send Standard Correspondence messages:

Un-ticking this option will disable the system from sending out automated system emails about the project. To be used if entering a project into the system for internal records only. Any suppliers attached to the project will not receive any emails relating to this project.

When disabling 'Send Standard Correspondence messages' on a project, the project will be identified on the project administration screen by a red cross against it.



The screenshot shows the 'Project Administration' screen. On the left, there is a search bar with 'Data Filter: Show All' and a search button. On the right, there is a sidebar with a 'Project' menu containing 'Project Summary', 'Project History', 'Add Project', 'Edit Project', 'Project Award Criteria', and 'Reports'. The main table has columns for 'Title', 'Reference', 'Next Return Date', 'Published to OJEU', and 'Awarded'. A red cross is visible in the 'Published to OJEU' column for the row titled 'Security Services Tender'.

Title	Reference	Next Return Date	Published to OJEU	Awarded
Mini Competition - Portable Appliance Testing	P/REF 00000006			
Security Services Tender	P/REF 00000009		✗	
Supply of Fresh Fruit (Auction)	P/REF 00000007			
Tender for Cleaning Services	P/REF 00000008			
Tender for IT Services	P/REF 00000004			
Tender for Supply of Wheelie Bins	P/REF 00000005			

Raise Action on user when incoming correspondence is received

The system will create an action within the system against the user specified for each incoming correspondence received from suppliers associated with the project.

The user that the action is against must click the "Complete Action" button when the correspondence has been dealt with. Any incomplete actions will remain in the actions screen.

Show award criteria on supplier web portal:

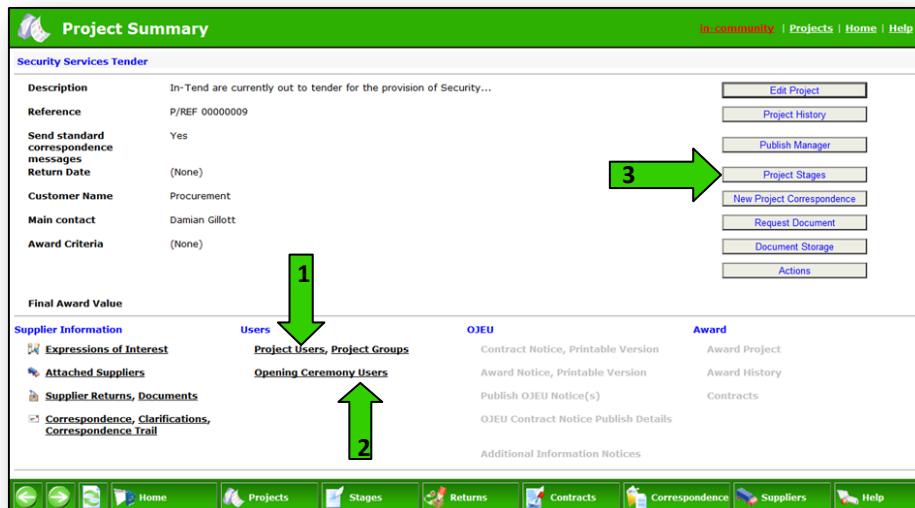
If you have entered percentages into the 'Award Criteria' tab, you can choose whether to publish this information to the supplier website or not.

Finally click 'OK' to complete the tender advertisement.

Now you have created your project, it will list in the Project Administration view. Select the project you wish to view and click on the '**Project Summary**' option at the top of the right hand side menu (this is where you are able to manage your project).

Managing the Project from the Project Summary Screen

From the 'Project Summary' screen you can access and manage all of the Project information.



The screenshot shows the 'Project Summary' screen. At the top, there are tabs for 'In-community' (selected), 'Projects', 'Home', and 'Help'. Below the tabs, there's a 'Security Services Tender' section with fields for Description, Reference, Send standard correspondence messages, Return Date, Customer Name, Main contact, and Award Criteria. To the right of this section is a vertical menu with buttons for 'Edit Project', 'Project History', 'Publish Manager', 'Project Stages', 'New Project Correspondence', 'Request Document', 'Document Storage', and 'Actions'. A green arrow labeled '3' points to the 'Project Stages' button. In the center of the screen, there are four main sections: 'Supplier Information' (with links to Expressions of Interest, Attached Suppliers, Supplier Returns, Documents, and Correspondence, Clarifications, Correspondence Trail), 'Users' (with links to Project Users, Project Groups and Opening Ceremony Users), 'OJEU' (with links to Contract Notice, Printable Version, Award Notice, Printable Version, Publish OJEU Notice(s), and OJEU Contract Notice Publish Details), and 'Award' (with links to Award Project, Award History, and Contracts). Below these sections is a 'Additional Information Notices' section. At the bottom of the screen is a navigation bar with icons for Home, Projects, Stages, Returns, Contracts, Correspondence, Suppliers, and Help. A green arrow labeled '1' points to the 'Project Users' link in the 'Users' section, and a green arrow labeled '2' points to the 'Opening Ceremony Users' link in the same section.

Project Summary

The Project Summary is the area where all the information relating to your tender will start to accumulate as you go through the process. In the 'Supplier Information' section you will be able to view all details relating to the supplier involvement, from Expressions of Interest and Correspondence to their Supplier Returns! From this area you can add Project Users (1); this will allow them to see the areas of the project as per the rights allocated.

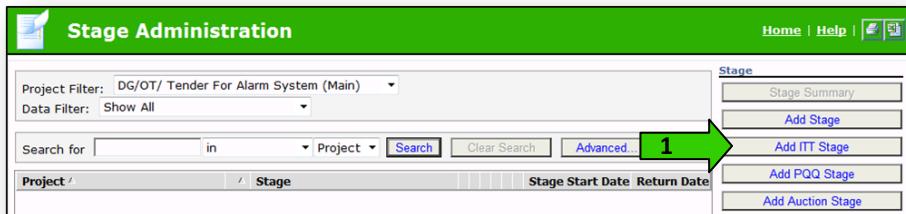
You are also able to attach the users who are expected to be present during the opening ceremony procedure (2). By doing this, all users attached will be asked to enter their password at the beginning and the end of the Opening Ceremony to ensure they were present during the whole process and provide a thorough audit trail.

Please note: You are able to change the Users upon starting the Opening Ceremony if attendees alter.

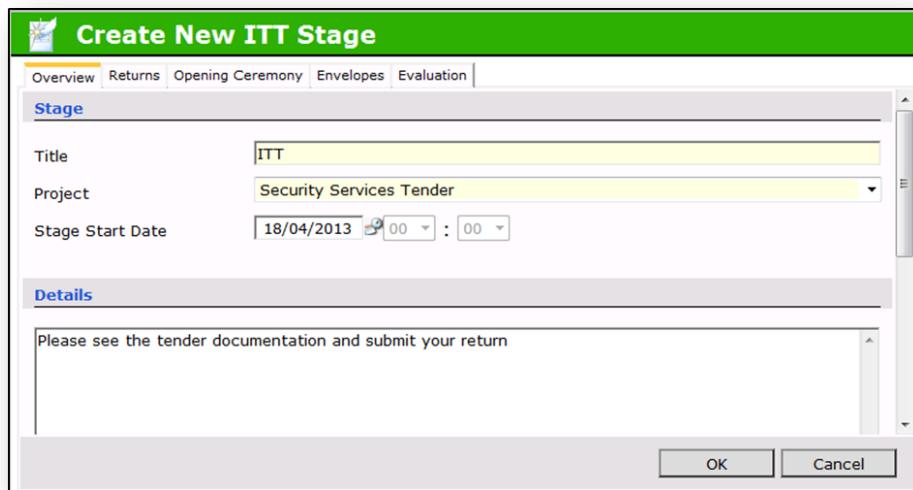
The next step is to create the (first) stage, to do this click on the 'Project Stages' button at the right hand side (3).

Setting up an In-Tend 'Stage'

In the 'Stage Administration' screen there are 3 stage options. 'Add Stage' can be used for any kind of stage giving full set up options. 'Add ITT' & 'Add PQQ' can be used to create a stage condensed to only the minimum setup requirements.



Select the 'Add ITT Stage' (1) button



Complete all the relevant tabs across the top of the 'Create New Stage' screen, once completed click the 'OK' button to save your updates and create the Stage. The Stage will then appear in the 'Stage Administration' window.

Overview Tab

The Stage and Project titles will automatically populate.

The start date defaults to the day you are creating the stage but can be changed to a date in the future if required.

The Details and Notes sections can be used to enter relevant information relating to the Stage. You can insert standard text by using the '**Standard Text**' button.

Returns Tab

Receiving

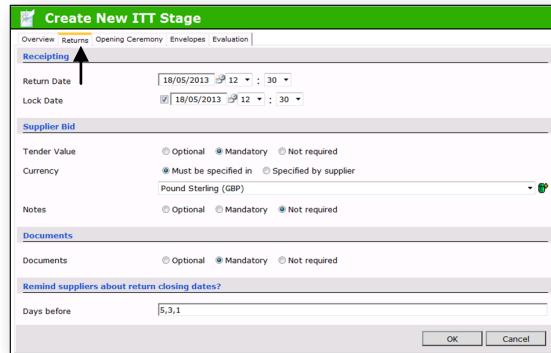
Enter the end date and time for the stage. This field defaults to today's date and the time the stage was created. This will dictate the information that suppliers see in the tender return section. Suppliers will see the current server time and will be able to view a countdown which will indicate the days, hours, minutes and seconds remaining until the tender closing date. This controls whether the return is on time or late (depending on the settings that are chosen in the Opening Ceremony tab, such as 'Accept late returns')

By ticking the Lock Date box, the Opening Ceremony users are unable to perform the Opening Ceremony until the lock date and time has passed, so the supplier returns WILL NOT be opened early. This field defaults to today's date and the time the stage was created.

Supplier Bid

You can choose whether or not you would want the suppliers to enter their bidding value as part of their return by selecting: Optional/Mandatory/Not Required

If you select Optional or Mandatory, you can either set the currency in which the supplier must quote or allow them to choose. You can also force additional notes if required.



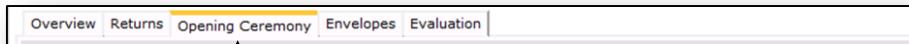
Documents

You can set the requirement for suppliers to return documentation as part of their tender return. This defaults to Mandatory (this is greyed out if the supplier bid option is 'Not Required')

Remind suppliers about return closing dates

The In-Tend system will automatically generate reminder emails for suppliers involved in the tender based on the information entered in this field. For the example shown, suppliers would receive a reminder 5 days, 3 days and 1 day before the tender closing date.

Opening Ceremony tab



Settings



Open using a formal opening ceremony:

Opening Ceremony attendees will be set up as users in the In-Tend system and will be pre-selected. It will ask for all attendees' passwords at the beginning and at the end of the opening ceremony to prove they were there throughout the whole process. There will be an audit log of the attendees.



Force the entry of value and currency against each return:

If ticked, this forms a mandatory field and will force an opening ceremony attendee to insert the suppliers bid. This means going into each individual supplier return, locating their bid and inserting that price. The system will not allow you to complete the opening ceremony without inserting the bid for **every** return.



Reject all pending returns (not yet received) upon starting the opening ceremony:

If you have received 10 expressions of interest in a tender but only receive 8 tender returns, when performing the opening ceremony it will open all 8 returns and give you the supplier details and attached contents. By ticking this option, it will also open up the supplier details for the two suppliers who have not returned but it will state that they are a 'No Submission'. If you do not tick this option, it will only open up the 8 returns and the other 2 would stay as 'Return Pending, Unknown Supplier'.



Reject all late returns upon starting the opening ceremony:

If you allow the supplier to make a late return (see option in the list below) you can set the system to automatically reject any return that is sent after the tender closing date. If you do not check this box you will have the option to manually reject the return after the Opening Ceremony.

Returns



Allow multiple returns:

By ticking this box, the supplier will be able to make modified returns if they need to amend or add to a previous submission. The supplier resubmits the complete tender response again and this will supersede any previous returns.



Allow returns after the stage return date/time:

If you do not tick this box the suppliers will be unable to make a late return. If a supplier tries to make a return 1 minute after the tender closing date their system will tell them that the time and date has passed and therefore they are unable to make a return.



Allow returns after the opening ceremony:

If you tick this box, suppliers will be able to make a tender return, even if the opening ceremony has been completed.



Automatically open returns when received:

By ticking this box, the system will automatically open a supplier return as soon as it comes into the system. You will then have access to the supplier details and contents with no need for an opening ceremony.



Alias supplier name until return opened:

By ticking this box the supplier will remain anonymous until the opening ceremony takes place.

Standard Correspondence



Send Stage Accepted Email

After the opening ceremony has been completed, you should either accept or reject the suppliers return. By accepting the return, the supplier will get a tender status update when he logs into In-tend and views the tender history which will tell him that the tender has been opened and is now being considered. By ticking this box, the system will send an automatic email informing the supplier of this in addition to the status update.



Send Stage Rejected Email

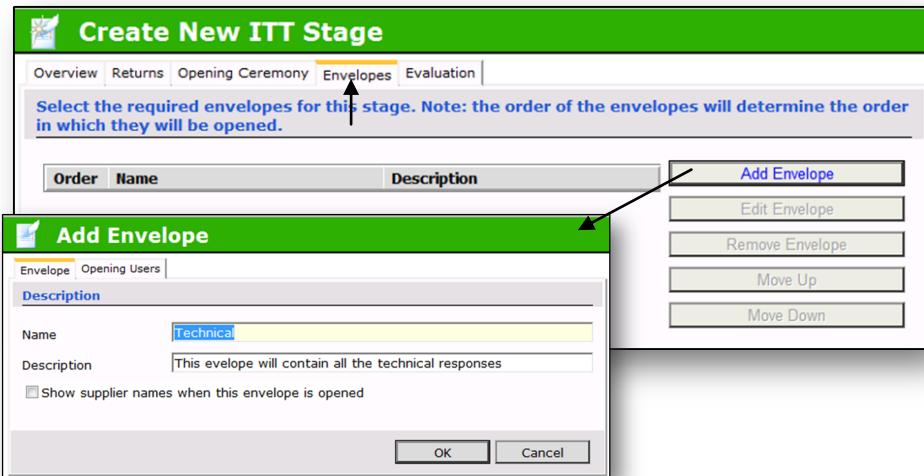
You would only reject a supplier return if for some reason you are refusing to evaluate their tender response. By rejecting the return, the supplier will get a tender status update when he logs into In-tend and views the tender history which will tell him that the tender has been opened.

(If envelopes are not required please skip this page)

Envelopes

Electronic envelopes can be created and used in which to separate tender documents when the supplier submits a tender response. Envelopes are opened in sequence with a password after the opening ceremony has been conducted.

This allows for the for documents to remain locked and unavailable (eg documents within a Financial Envelope) whilst the contents of the first envelope are being evaluated (eg contents of a Technical Envelope)



Create New ITT Stage

Overview Returns Opening Ceremony Envelopes Evaluation

Select the required envelopes for this stage. Note: the order of the envelopes will determine the order in which they will be opened.

Order	Name	Description
-------	------	-------------

Add Envelope

Envelope Opening Users

Description

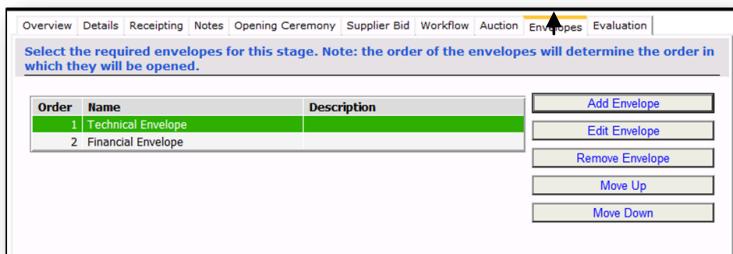
Name: Technical

Description: This envelope will contain all the technical responses

Show supplier names when this envelope is opened

OK Cancel

Envelopes are used in conjunction with placeholders. Once you have created the envelopes, you can assign any placeholders (document that a supplier must upload) you have created to the relevant envelope. Note: Placeholders are created within the document set after the creation of the stage, more information can be found on page 22



Create New ITT Stage

Overview Details Receiving Notes Opening Ceremony Supplier Bid Workflow Auction Envelopes Evaluation

Select the required envelopes for this stage. Note: the order of the envelopes will determine the order in which they will be opened.

Order	Name	Description
1	Technical Envelope	
2	Financial Envelope	

Add Envelope

Envelope Opening Users

Description

Name: Technical

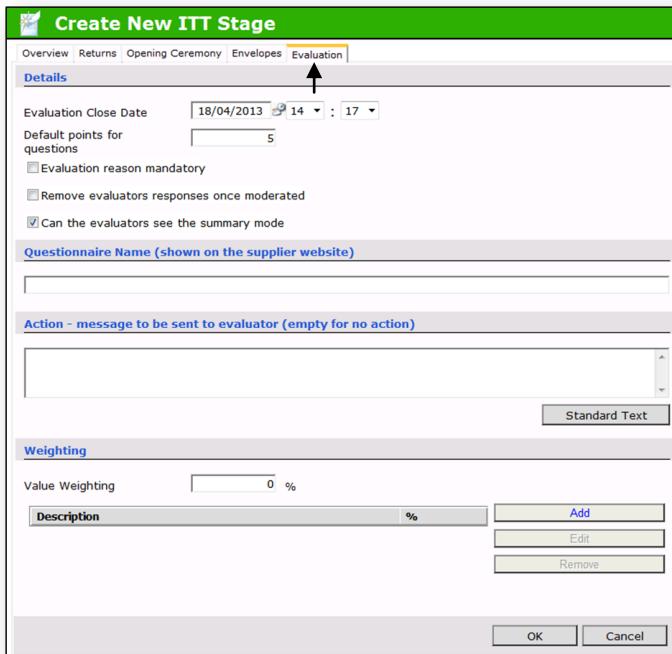
Description: This envelope will contain all the technical responses

Show supplier names when this envelope is opened

OK Cancel

Evaluation Tab

Using e-Evaluation requires comprehensive set up, please consult the e-Evaluation manual for guidance. If e-Evaluation is not being used this tab will not need to be completed. Simply click the "Ok" button to save the stage.



The screenshot shows the 'Create New ITT Stage' dialog box with the 'Evaluation' tab selected. The 'Evaluation' tab is highlighted with a yellow border. The form includes fields for 'Evaluation Close Date' (set to 18/04/2013), 'Default points for questions' (set to 5), and several checkboxes for evaluation settings. It also includes sections for 'Questionnaire Name', 'Action - message to be sent to evaluator', and 'Weighting'. At the bottom, there are 'OK' and 'Cancel' buttons.

The “Evaluation” tab should be used to set the preferences for the evaluation module.

“Evaluation Close Date” sets a deadline for the Evaluators & Moderators to complete the evaluation process.

“Value Weighting” is used to set the percentage that the bid value is worth against the overall tender.

“Value Weighting” should be used in conjunction with either selecting “Tender Value” mandatory on the Supplier bid of the **Returns tab** or selecting “Force the entry of value and currency against each return” on the **Opening Ceremony tab**.

“Default points for questions” Sets the default value for the questions created in the evaluation questionnaire.

- Evaluation reason mandatory – Forces the evaluators / moderators to submit a reason to justify their scoring.
- Remove evaluator responses once moderated :- Hides the evaluators response if a question has been moderated.
- Can the evaluators see the summery mode :- Allows the evaluators access to the summary screen.

“Action – message to be sent to the evaluator (empty for no action)” – triggered by entering information in the text field, this sets an automatic action against each evaluator and uses the **“Evaluation close date”** as the completion date for the action. The Users will receive an email informing them of this action.

Once completed click ‘OK’.

Project	Stage	Stage Start Date	Return Date
DG/OT/ Tender For Alarm System (Main)	1 ITT	28/11/2011 00:00	28/12/2011 09:35

Date	Type	Supplier	Stage
28/11/2011 10:08:11	Return From Supplier	DPS Gas Suppliers	ITT
24/11/2011 16:16:48	Return From Supplier	DG/ Tender for IT Equipment	ITT

This will then take you into ‘Stage Administration’ where all stages relating to your current tender will be listed. To view further details for individual stages, highlight the stage and select Stage Summary (1) from the right-side menu.

Stage Summary

ITT

Project	DG/OT/ Tender For Alarm System (Main)	2	Edit Stage
Description			Document Set
Stage Start Date	28/11/2011 00:00		Build Document Set
Return Date	28/12/2011 09:35		Stage Publish Manager
Lock Date	Not Locked		Publish Document Set
Information Purposes Only	No		Opening Ceremony
			New Stage Correspondence
			Actions

Supplier Information

Expressions of Interest	Evaluation
Attached Suppliers	Evaluation Users
Supplier Returns, Documents	Evaluation Setup
Correspondence, Clarifications	Evaluation

Supplier Messages

Date	Type	
28/11/2011 10:08:11	Return From Supplier	DPS Gas Suppliers
24/11/2011 16:16:48	Return From Supplier	DG/ Tender for IT Equipment

Actions

[Home](#) [Projects](#) [Stages](#) [Returns](#) [Contracts](#) [Correspondence](#) [Suppliers](#) [Help](#)

To add the documents that will be sent to your supplier, click on '**Document Set**' (2).

From this area you can either '**Add Document**' or '**Add Multiple Documents**' and '**Add Questionnaires**'.

Document Set

1

Search for in

Project: 1234/ABC Stationery Stage: ITT

File	Description	Size	Date Uploaded

[Documents](#)
[Add Document](#)
[Add Multiple Documents](#)
[Add Questionnaire](#)
[Document Wizard](#)
[Placeholders](#)
[Edit Link](#)

Add Document

Click on the '**Add Document**' button (1) and the Browse window will appear. Click on the '**Browse**' button to search on your network for the document you wish to add to the document set. Click '**OK**' to load the document into the 'Add Document' window.

Description:

In the Description field you may type details about a document, such as why it has been marked as pending.

Document pending:

Tick this check box if the document you wish to upload is not yet ready to be added to the document set. This will create a space for the document and the system will not allow you to publish the document set to suppliers until the pending document has been uploaded into the system.

Internal Document (not published):

Tick the 'Internal Document (not published)' check box if the document you added is NOT to be published to the supplier. For example, the document may be a control document for your purposes only.

Raise action on this document:

Tick the 'Raise action on this document' check box to place an action on a user regarding the document. When '**OK**' is clicked, this will bring up the 'Create New Action' window.

Click '**OK**' to add the document to the document set.

Add Multiple Document

To insert up to five documents to the 'Document Set', click on '**Add Multiple Documents**'. The Browse window is displayed which allows you to select five files individually. Note: The check boxes mentioned in step 3 are not available using this method.

Add Questionnaire

If you wish to add questionnaires to the document set, click the '**Add Questionnaire**' button on the right of the screen. The 'Add Questionnaire' window is displayed with a list of available questionnaires. Tick the box/boxes next to the Questionnaire(s) you want to add it to the document set and then click '**OK**'. If the questionnaire you want to add is not listed, then it may not have been created or completed. Only completed Questionnaires will be shown in the 'Add Questionnaire' window.

Document Wizard

From the Document Wizard you can copy documents from other areas within the system, 'Standard Document Set', 'Existing Stage', 'Project Documents', 'Contract Documents' or 'Customer Documents'. The most commonly used is the 'Standard Document Set' which allows you to create folders within the system.

To add a standard document set, select the '**Standard Document Set**' radio button. This filters the list to your standard document sets. Select the document set you wish to add and click the '**Next**' button. The next window will list the documents in the set. If you want to add these documents, select the relevant tick box and then the '**Finish**' button. (Standard document sets are set up in the 'Look up Tables'. Instructions for how to do this can be found in the Advances guide).

Placeholders

Placeholder are a way of specifying a document type for upload by the supplier. Adding a placeholder is an excellent way of ensuring the suppliers return specific documents required as part of their tender submission. The example below shows a placeholder created for the supplier to upload their "Offer Submission Form". When a placeholder is created a red upload button will be displayed along side the description (*instruction to supplier*).

To add a placeholder, click the '**Add Placeholder**' button. In the pop-up window, create a description of the document you are expecting (this forms the instruction to the supplier) and then select the document type from the drop down list before pressing '**OK**'. Please note: The document type is a way of labeling the document internally within the system. Users of the system can create new document types if required (See Administration Guide) alternatively select the document type "General" if the document type you require is not listed in the drop down list.

Ticking the box "This document must be included in the return" creates a mandatory upload button and the supplier will be required to upload against the placeholder before they are able to submit their return.

Multiple Envelopes -Note: If using multiple envelopes the envelope drop down can be used to determine which envelope the document will belong to. (Information on using envelopes can be found on page 75)

Allow suppliers to upload non-placeholder documents when using placeholders:

Un-tick this box if you would like to prevent the suppliers from uploading anything other than the placeholders that have been created. (This removes the generic "Add Documents" button from the suppliers submission screen).

Please note: If you un-tick this option you will need to make sure you have created the correct number of placeholders for the suppliers to upload their documents against as the "Add Documents" button will not be available.

This example shows the suppliers return screen showing four placeholders that have been created asking for four documents, Offer Submission Form, Tender Return, Public Liability Insurance Policy & ISO Accreditation.

Supplier Site—Supplier Viewing Return Screen

Workflow—Actions on returned documents

The screenshot shows two overlapping windows. The top window is 'Stage Summary' for a project named 'Security Services Tender'. It lists details like Stage Start Date (18/04/2013 00:00), Return Date (18/05/2013 12:30), and Lock Date (Not Locked). The bottom window is 'Edit Stage' for the same project. It has tabs for Overview, Details, Receipting, Notes, Opening Ceremony, Supplier Bid, Placeholders, Workflow (which is selected), Auction, and Evaluation. A red arrow points from the 'Workflow' tab in the Stage Summary to the 'Workflow' tab in the Edit Stage window. Another red arrow points from the 'Workflow' tab in the Edit Stage window to the 'Add' button in the workflow configuration dialog. A green arrow labeled '1' points to the 'Add' button. The dialog shows a list with 'Document Received' and buttons for 'Add', 'Edit', and 'Remove'.

If you have added Placeholders, you are then able to add an associated workflow (the workflow tab of edit stage screen). This allows you to set up actions against users, which will generate an action (sent via email) and will be triggered once documents are received and opened (either automatically or after the Opening Ceremony.) Click “Add “(1)

to create the workflow ,
specify a description of the
action you want completing
i.e. **‘Please check this insurance has the correct level of cover’**. Select the user or group you wish to be actioned, and how long they have to complete the action. Lastly select the document type that you want to trigger the action.

The dialog is titled 'Add Work Flow Template Item'. It has fields for 'Description' (containing 'Please check this insurance document has the correct level of cover.' and 'Many Thanks'), 'Days to complete action' (set to 3), 'Who should be actioned?' (set to 'User' and 'Damian Gillott'), and 'Document Type' (set to 'Insurance - Public Liability'). A red arrow points from the 'Document Type' field to the 'Insurance - Public Liability' option in the dropdown menu.

Document Set

Project: Security Services Tender Stage: ITT

File	Size	Date Uploaded
Tender Specification ITT.doc	26 KB	19/04/2013
Pricing Schedule.doc	26 KB	19/04/2013
Terms & Conditions.doc	26 KB	19/04/2013
Offer Submission Form.xls	17 KB	19/04/2013
Offer Submission Form	Placeholder	
Tender Return	Placeholder	
Insurance - Public Liability	Placeholder	
ISO Accreditation	Placeholder	

Documents

- Add Document
- Add Multiple Documents
- Add Questionnaire
- Document Wizard
- Edit Link**
- Remove
- View
- Save

Placeholders

- Add Placeholder
- Edit Placeholder
- Remove Placeholder

Manage

- Move Up
- Move Down

Actions

- Create New Action
- Actions**

Showing 1 to 8 of 8

Close

Edit Stage Document

Details

Document

Description

Offer Submission Form.xls

Add View Remove

This form should be completed by supplier and uploaded to the Offer Submission Form placeholder

Document pending

Internal document (not published)

Raise action on this document

Position 4

OK Cancel

If you need to alter the position of the document within the list this can be done by selecting “Edit Link” and changing the position number.

When you are confident that you have added all tender documents to send to suppliers as part of the current stage and have added any required Placeholders, you are ready to build the document set. By building the document set you are confirming that the documents are ready to be published to suppliers.

To do this you must be in the ‘Stage Summary’ so you need to ‘Close’ (1) the Document Set

(you may need to scroll down to see the ‘Close’ button)

Stage Summary

Invitation to bid

Project	DG/UN Medical Supplies
Description	
Stage Start Date	08/11/2012 00:00
Return Date	08/11/2012 14:22
Lock Date	Not Locked
Information Purposes Only	No

Edit Stage

Document Set

Build Document Set

Stage Publish Manager

Print Document Set

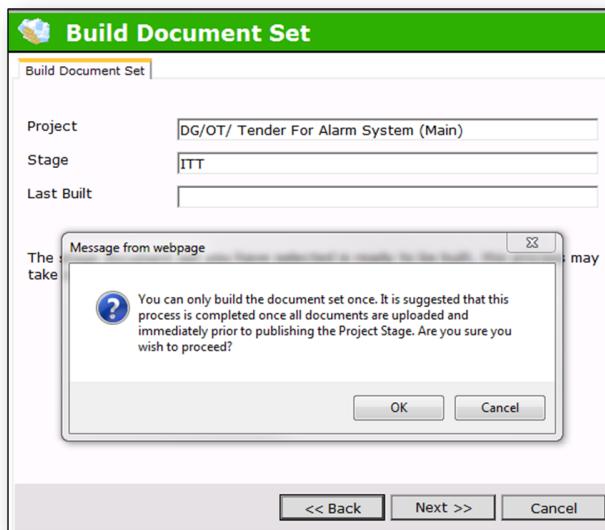
Opening Ceremony

Open Envelope

New Stage Correspondence

Request Document

Actions



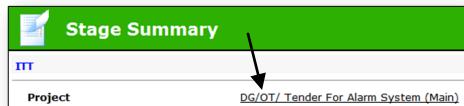
Once you are back in the 'Stage Summary' screen you must build the document set. Click the '**Build Document**' button and you will then be presented with the above screen to complete and build the document set.

Please Note: You are only able to build the document set once, so please ensure that it is the very last thing you do and that you are sure that all documents have been added to the Document Set, as you will be unable to amend after the document set has been built. **NOTE: If you are using e-evaluation module then this will need to be set up BEFORE the documents are built.(See evaluation manual)**

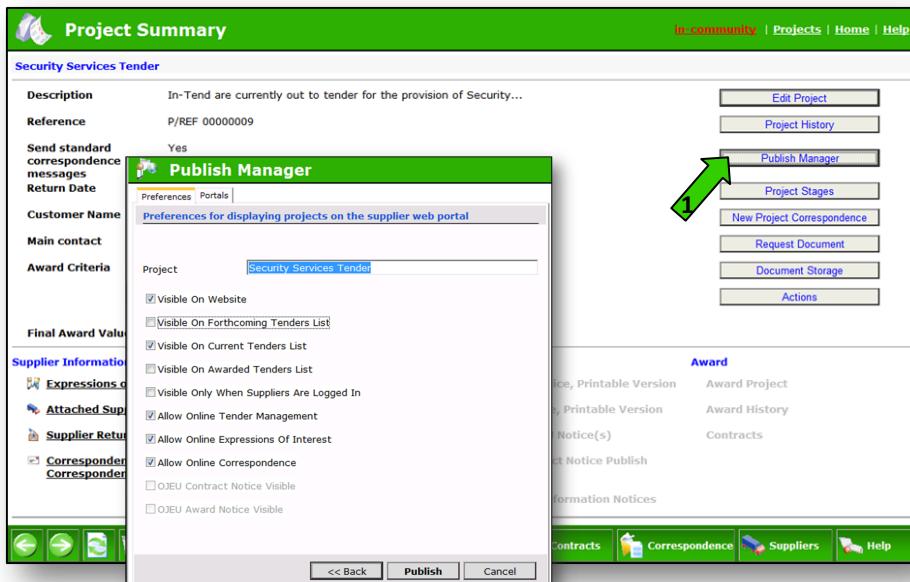
Once the tender is ready, you must publish the Project to the supplier portal.

Remember that in the first instance you are only publishing the project, the stage and document set will be sent to suppliers who express an interest in the tender and are accepted in the Organiser – to publish the project you must be in 'Project Summary'.

To get back to the 'Project Summary' screen, click on the **Project** title (underlined).



Now click on '**Publish Manager**' to the right hand side (1).



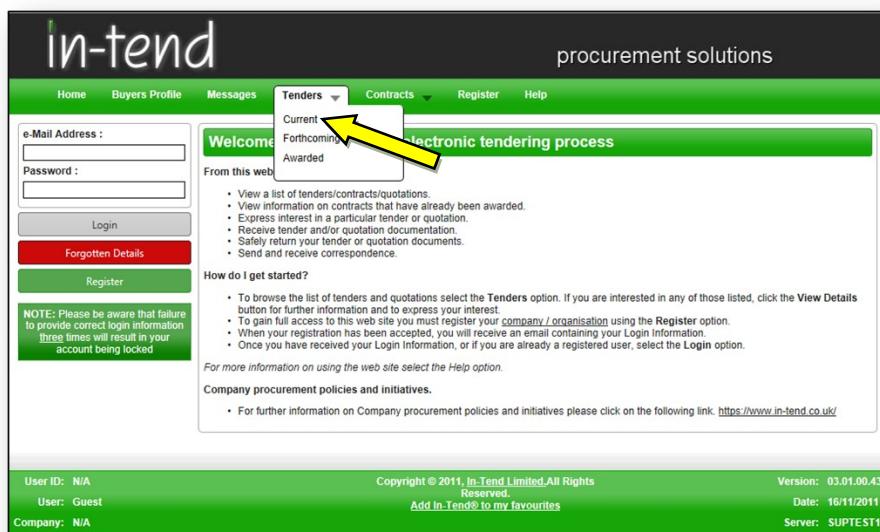
The screenshot shows the 'Project Summary' screen for a 'Security Services Tender'. On the right, a 'Publish Manager' dialog box is open. The 'Publish Manager' button is highlighted with a green arrow and a large '1'. The dialog box contains several checkboxes for publishing project information on different supplier website sections. The 'Project' dropdown is set to 'Security Services Tender'. At the bottom of the dialog box are 'Back', 'Publish', and 'Cancel' buttons. The main screen shows various project details and navigation links like 'Edit Project', 'Project History', and 'Help'.

You are given a number of options to choose:

- **Visible On Web Site** – should always be ticked as the project must be visible somewhere – the options below will determine whereabouts it will be visible. (If you ever need to remove a project off the supplier site temporarily, for reasons such as an error in the advertisement, un-tick this box)
- **Visible On Forthcoming Tenders List** – will publish your project information in the **public area** of the supplier website within the 'Forthcoming Tenders' section'
- **Visible On Current Tenders List** – will publish your project information in the **public area** of the supplier website within the 'Current Tenders' section
- **Visible on Awarded Tenders List** – will publish your project information in the **public area** of the supplier website within the 'Awarded Tenders' section
- **Visible Only When Suppliers are Logged In** – will publish your project information to the secure area of the supplier site, only to suppliers that have logged in. (You must ensure that the Forthcoming Tenders List and Current Tenders List checkboxes are un-ticked)

- **Allow Online Tender Management** - will allow your suppliers to manage tenders and their tender responses
- **Allow Online Expressions of Interest** – will allow suppliers to register expressions of interest in tenders
- **Allow Online Correspondence** – will allow your suppliers to view and send correspondence through the system

SUPPLIER WEBSITE



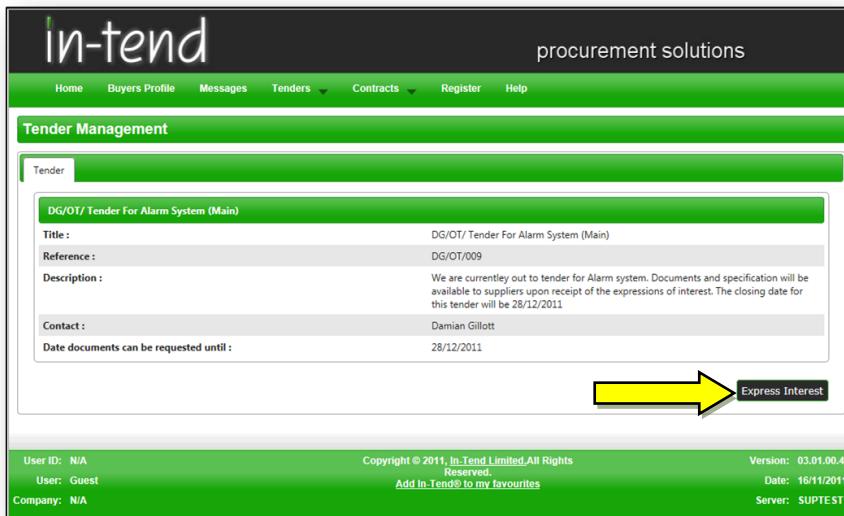
The screenshot shows the In-Tend Supplier Website. The top navigation bar includes links for Home, Buyers Profile, Messages, Tenders (which is currently selected and expanded), Contracts, Register, and Help. The main content area features a 'Welcome' message: 'From this web site you can take part in the electronic tendering process'. Below this, there are sections for 'Current Tenders', 'Forthcoming Tenders', and 'Awarded'. A yellow arrow points to the 'Tenders' dropdown menu. The 'Current' section lists the following steps:

- View a list of tenders/contracts/quotations.
- View information on contracts that have already been awarded.
- Express interest in a particular tender or quotation.
- Receive tender and/or quotation documentation.
- Safely return your tender or quotation documents.
- Send and receive correspondence.

There is also a 'How do I get started?' section with instructions for logging in and registering, and a 'Company procurement policies and initiatives' section with a link to the company's website.

This is the general area of the website that any supplier can view. To view the tender that you have just published, click on '**Current Tenders**'.

You will be presented with basic project information on all projects found within the 'Current Tenders' section. To view further information on a project, click the '**View Tender Details**' found to the right of the title. From this area the supplier can then '**Express Interest**'. (as seen below)



The screenshot shows the In-Tend Tender Management interface. At the top, there is a navigation bar with links for Home, Buyers Profile, Messages, Tenders, Contracts, Register, and Help. Below this is a sub-navigation bar for 'Tender Management' with a 'Tender' link. The main content area displays a tender detail for 'DG/OT/ Tender For Alarm System (Main)'. The details include:

Title :	DG/OT/ Tender For Alarm System (Main)
Reference :	DG/OT/009
Description :	We are currently out to tender for Alarm system. Documents and specification will be available to suppliers upon receipt of the expressions of interest. The closing date for this tender will be 28/12/2011
Contact :	Damian Gillott
Date documents can be requested until :	28/12/2011

At the bottom right of the content area, there is a button labeled 'Express Interest' with a yellow arrow pointing to it. The footer of the page contains user information (User ID: N/A, User: Guest, Company: N/A), copyright information (Copyright © 2011, In-Tend Limited. All Rights Reserved. Add In-Tend® to my favourites), and system details (Version: 03.01.00.43, Date: 16/11/2011, Server: SUPTEST1).

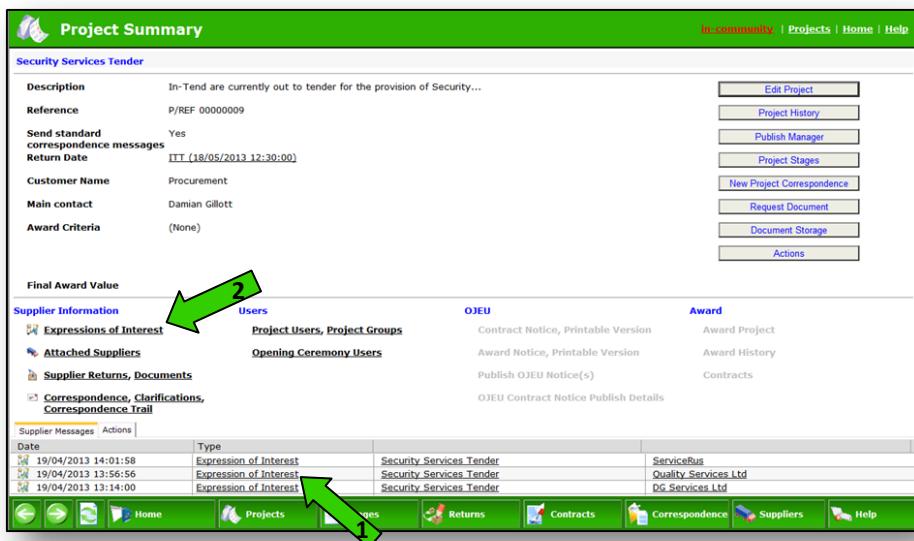
To be able to express an interest, the supplier must either already be a registered supplier, in which case they will need to enter their email address and password to log in, or they must complete a basic registration form, providing company details, contact name and business categories.

Once completed, it will confirm their registration and that it included their "Expression of Interest". An email would then automatically be sent when the supplier was approved (this can be done either automatically or manually depending on the settings in the Organiser. Further instruction can be found in the 'Advanced guide').

ORGANISER

* If the project has been set to 'Automatically accept expressions of interest' & 'Automatically publish first stage documents' you may skip this page.

* When the expression of interest comes through, you will see an alert in 'Supplier Messages'. You can either click on the underlined 'Expression of Interest' (1) or go through your project summary and view it from the 'Supplier Information' section (2).



Project Summary

Security Services Tender

Description In-Tend are currently out to tender for the provision of Security...

Reference P/REF 00000009

Send standard correspondence messages Yes

Return Date ITT (18/05/2013 12:30:00)

Customer Name Procurement

Main contact Damian Gillott

Award Criteria (None)

Final Award Value

Supplier Information

- [Expressions of Interest](#) (2)
- [Attached Suppliers](#)
- [Supplier Returns, Documents](#)
- [Correspondence, Clarifications, Correspondence Trail](#)

Users

- [Project Users, Project Groups](#)
- [Opening Ceremony Users](#)

OJEU

- Contract Notice, Printable Version
- Award Notice, Printable Version
- Publish OJEU Notice(s)

Award

- Award Project
- Award History
- Contracts

Supplier Messages

Actions

Date	Type	Project	Supplier
19/04/2013 14:01:58	Expression of Interest	Security Services Tender	Servicebus
19/04/2013 12:56:56	Expression of Interest	Security Services Tender	Quality Services Ltd
19/04/2013 12:14:00	Expression of Interest	Security Services Tender	DS Services Ltd

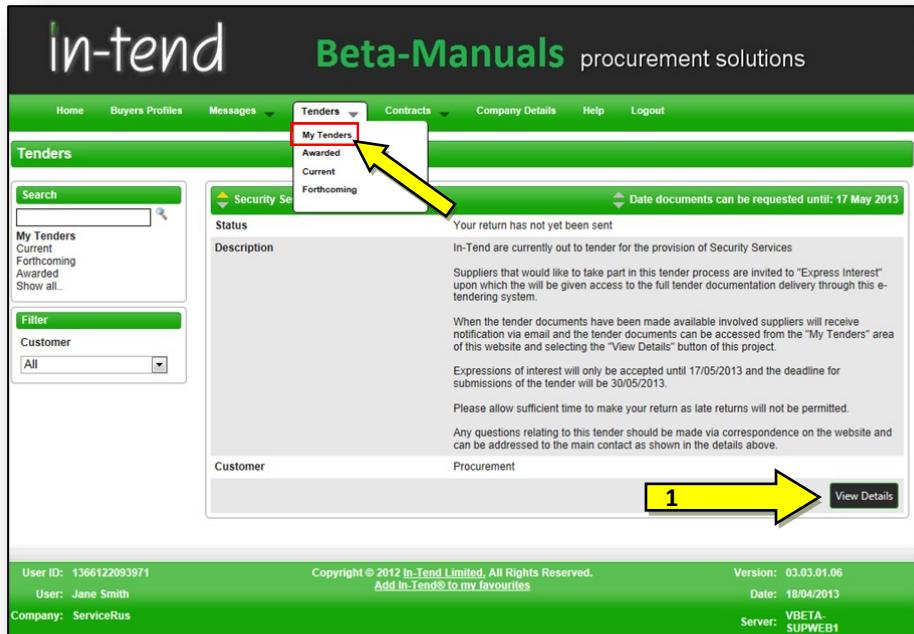
Toolbar:

- Home
- Projects
- Suppliers
- Contracts
- Correspondence
- Returns
- Log Out

If more than one Expression of Interest is received, you can '**Accept All**'. Once you have accepted the Expression of Interest, it will automatically bring up '**Publish Document Set**' and ask you to confirm that you wish to send the supplier the stage documentation that you uploaded in your Document Set**.

**If you do not get the Publish Document Set screen and were expecting to, it may be because you have forgotten to 'Build Document Set'. Check the Project Stages. If you have a Red flag against the stage then the stage has not been built. Click on 'Stage Summary' and 'Build Document Set' to complete the necessary step. Once this has been completed you should get the prompt to 'Publish Document Set'.

SUPPLIER SITE



The screenshot shows the In-Tend Supplier Site interface. At the top, there is a navigation bar with links for Home, Buyers Profiles, Messages, Tenders, Contracts, Company Details, Help, and Logout. The Tenders section is currently selected, with a dropdown menu showing 'My Tenders', 'Awarded', 'Current', and 'Forthcoming'. A yellow arrow points to the 'My Tenders' option. The main content area displays a tender for 'Security Services'. It includes a search bar, a 'My Tenders' sidebar with options for Current, Forthcoming, Awarded, and Show all, and a 'Filter' sidebar with a dropdown set to 'All'. The tender details show that In-Tend are tendering for security services. Suppliers can express interest by clicking 'View Details'. The page footer contains user information (User ID: 1366122093971, User: Jane Smith, Company: ServiceRus), copyright information (Copyright © 2012 In-Tend Limited, All Rights Reserved. Add In-Tend® to my favourites), and server details (Version: 03.03.01.06, Date: 18/04/2013, Server: VBETA-SUPWEB1). A yellow arrow points to the 'View Details' button, which is labeled with the number '1'.

Once the Expression of Interest has been accepted, the supplier would receive an email informing them that they have received tender documentation. The supplier should navigate to '**Tenders**' and click the '**My Tenders**' area if they want to view the tender details. They will now be able to see the stage information and a '**View Details'(1)** button, which will take them through to the screen shown on following page.

This area the supplier can see the stage tab (ITT)

On selecting the ITT tab will take them through to the stage details from which the supplier may submit their return.

How To Attach & Submit Documents

- If any mandatory documents have been requested, they will be shown in the **My Tender Return** section against a **Red** button. You will need to attach them using the **Attach Documents** button within the **My Tender Return** section to the bottom of this screen.
- If a Questionnaire is required to be completed, it will be shown in **Red** and marked **Not Started** in the **My Tender Returns** section. It is mandatory that any Questionnaire's must be completed before the tender can be submitted.
- To attach additional documents you wish to submit as part of your tender return, click the **Attach Documents** button under the **My Tender Return** section (if available). These will then appear in the **My Tender Return** section.

NOTE : Large files may take some time to upload. We advise you to keep the files under 5MB.

4. When you have completed all the above steps and are ready to submit your tender return, click the red **Submit Return** at the bottom of this page.

Server Time: 22 Apr 2013 10:00:06 Due Date: 18 May 2013 12:30:00 Time Remaining: 3 Weeks 5 Days 2 Hours 29 Minutes 34 Seconds

Tender Details		
Stage Name	ITT	
Locked Until	18 May 2013	
Closing Date	18 May 2013	
Description	Please see the tender documents and submit your return.	
Stage Start Date	18 April 2013	
Project Title	Security Services Tender	
Project Description		

Tender Documents Received	Description	Options
Tender Specification.ITT.doc	This is the ITT specification for suppliers	View Download
Pricing Schedule.doc		View Download
Terms & Conditions.doc		View Download
Offer Submission Form.xls	This form should be completed by supplier and uploaded to the Offer Submission Form placeholder	View Download

In the stage details the time remaining is displayed to the supplier along side the stage return deadline.

Note: All dates & times are set against the server time.

From this area, the supplier is able to view or download (1) any documents that have been sent out. They should upload any Placeholders (2) with the documents requested. The generic “Attach Documents” button (3) can be used by the supplier for any other documents they wish to include with their submission.

When the tender has been set making it mandatory for the supplier bid, this must be inputted in the bid value box (4).

They will be able to view the server time and the time remaining before the tender closing date.

The ‘Submit Return’(5) button will not allow the submission until they have uploaded all placeholders and answered any Questionnaires that they may have been sent. They are able to upload any other documents that they feel are relevant to the tender.

Tender Documents Received	Description	Options
Tender Specification ITT.doc	This is the ITT specification for suppliers	View Download 1
Pricing Schedule.doc		View Download
Terms & Conditions.doc		View Download
Offer Submission Form.xls	This form should be completed by supplier and uploaded to the Offer Submission Form placeholder	View Download

My Tender Return	Description	Options
Offer Submission Form	Please upload you completed Offer Submission Form	Upload Document 2
Tender Return	Please upload your tender return	Upload Document
Insurance - Public Liability	Please upload your public liability insurance	Upload Document
ISO Accreditation	Please upload your ISO accreditation (Optional)	Upload Document

Select documents you wish to add to the My Tender Return section above using the Attach Documents button below.

NOTE : Large files can take some time to upload. We advise you to keep file sizes under 5MB.

NOTE : Document Placeholders have been uploaded by the Procurement Department. Please upload a document for each mandatory placeholder before making a return.

[Attach Documents](#) 3

Submit My Return
<p>Bidding Details:</p> <p>Value: <input type="text"/> 4</p> <p>Currency : <input type="text" value="Pound Sterling (GBP)"/> 5</p> <p>When you have completed all the above steps and are ready to submit you tender return, click the Submit Return button.</p> <p>Note: You can make one or more returns on this stage. Your last return will supersede any previous returns.</p> <p>Submit Return</p>

As soon as the supplier submits their return they will be able to view their Receipt, this will confirm the tender reference and stage, who within the organisation has made the return and will list all the documents/questionnaires that have been uploaded and returned, as well as the value they are bidding (if asked to do so). This is always available for the supplier from the '**View Tender History**' button.

<h2 style="text-align: center;">Return Receipt</h2> <div style="background-color: black; color: white; padding: 5px; text-align: center;">Print</div> <p>Here is the receipt of your Return Submission. Please Print a hard-copy for your records...</p> <p style="text-align: center;">Tender : DGIOT/Tender For Alarm System (Main)</p> <p style="text-align: center;">Stage : ITT</p> <p>Submitted At : 28/11/2011 15:15</p> <p>Submitted By : Damian Gillott</p> <p>Submitted By (eMail) : dgjnc2@gmail.com</p> <p>Documents Returned : 2 items(s)</p> <p>Public Liability Insurance docx (Insurance - Public Liability)</p> <p>Tender Return - Training docx (Attached Document)</p> <div style="text-align: center; margin-top: 10px;"> <input style="width: 100px;" type="button" value="Close"/> </div>	
-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--

ORGANISER - Viewing returns

In the Organiser you will see the 'Supplier Messages' area will keep updating as returns are made. All the returns are listed in the 'Returns Administration' screen, which you can navigate to by either clicking on the '***Return from Supplier***' link in the 'Supplier Messages' area (1) or through the '***Supplier Returns***' link found in the 'Project Summary' (2). It is in the 'Returns Administration' screen that you will be able to navigate to the Opening Ceremony

Project Summary

Security Services Tender

Description	In-Tend are currently out to tender for the provision of Security...	Edit Project Project History Publish Manager Project Stages New Project Correspondence Request Document Document Storage Actions
Reference	P/REF 00000009	
Send standard correspondence messages	Yes	
Return Date	ITT (18/05/2013 12:30:00)	
Customer Name	Procurement	
Main contact	Damian Gillott	
Award Criteria	(None)	

Final Award Value

Supplier Information	Users	OJEU	Award
Expressions of Interest	Project Users, Project Groups	Contract Notice, Printable Version	Award Project
Attached Suppliers	Opening Ceremony Users	Award Notice, Printable Version	Award History
Supplier Returns		Publish OJEU Notice(s)	Contracts
Correspondence, Clarifications, Correspondence Trail		OJEU Contract Notice Publish Details	
Supplier Messages	Actions		

Date **Type**

22/04/2013 09:12:07	Return From Supplier	Security Services Tender	ITT
19/04/2013 14:00:22	Return From Supplier	Security Services Tender	ITT
19/04/2013 13:56:07	Return From Supplier	Security Services Tender	ITT




[Supplier Returns](#)

You will see the returns that have been made will all be listed as *'Unknown Supplier' (1). The supplier details will not be *visible until the Opening Ceremony has taken place. Any supplier that has failed to make a submission will be displayed as 'Pending' (2). Select the '**Opening Ceremony**' button on the right hand side (3) to start the opening of the returns. * *Based on the opening ceremony setting 'Alias Supplier Name until return is opened'*

Returns Administration

Project Filter: Security Services Tender
Data Filter: Show All

Search for: in Supplier Search Advanced

Status	Supplier	Received	Value	Currency	Project	Stage	Method
Received	Unknown Supplier	19/04/2013 09:37:36		Pound Sterling (GBP)	Security Services Tender	ITT	Web Site
Received	Unknown Supplier	19/04/2013 13:56:07		Pound Sterling (GBP)	Security Services Tender	ITT	Web Site
Pending	Unknown Supplier				Security Services Tender	ITT	Unspecified

Supplier Messages Actions

Date	Type	Details
22/04/2013 09:49:59	New Supplier Registration	Safe & secure UK
22/04/2013 09:37:36	Return From Supplier	Security Services Tender
22/04/2013 09:12:07	Return From Supplier	Security Services Tender

Opening Ceremony
Open Envelope
Receipts
Add Receipt
Edit Receipt
Remove Receipt
Returns
View Return
Compare Answers
Returns Assessment
Auction Returns
Returned Documents
Manage
Accept Return
Reject Return

Home Projects Stages Returns Contracts Correspondence Suppliers Help

When you start the Opening Ceremony, it will first give you the opportunity to change the settings (1) which were initially chosen when creating the stage and you will also be able to change the attendees (2)(if a Formal Opening Ceremony was chosen).

Opening Ceremony

Summary Details
You are about to start the opening ceremony. Please be aware that the following settings are enabled.

! This stage will use a 'Formal Opening Ceremony'. Please ensure that all attendees are present to enter their passwords.
! Pending returns will be ignored during this Opening Ceremony.
! Late returns will be 'Opened' when the Opening Ceremony is started.
! The value of each return is optional and may be provided during the Opening Ceremony.
! You will not be able to 'Accept' and 'Reject' returns during the Opening Ceremony.

Change Settings Change Attendees << Back Next >> Cancel

Enter Password(s):

Damian Gillott
Password: Notes:

Matthew McKeown
Password: Notes:

<< Back Next >> Cancel

When you click on '**Next**', all Opening Ceremony Users will be asked to enter their password before clicking '**Next**'.

If there are some returns pending, it will show a warning and will give you the opportunity to receipt any manual returns that may have been sent. To do this you should click

'Add Receipt' and choose the supplier. Give the receipt a reference and remember to alter the date and time to the date the manual return was received, if you do not do this the return will show as a late return.

Once any manual returns have been receipted click '**'Next'** (2), at which point all electronic returns will now open. (Optional) By clicking on the Manage button you are able to view details regarding the individual supplier returns . (You have access to this same information outside of the opening ceremony, so you do not need to go into each return and view the contents if this is not necessary at this stage).

Click Next and the users will be prompted for their passwords for a second time which will conclude the opening ceremony.

You may be able to Accept or Reject the return individually (subject to system settings) within the opening ceremony, the most common practice would be to Accept/Reject returns after the Opening Ceremony has been completed from the 'Returns Administration' screen (details on following page).

Once opened, the suppliers name & submitted bid value is displayed onscreen (subject to settings). Note: The value can be amended (subject to rights & permissions) if needed by clicking “View Return” and selecting “Modify Bid” button.

The Returns Administration screen shows a list of returns. The 'Returns' menu on the right includes 'View Return' (1), 'Accept/Reject' buttons (2), and 'Accept/Reject All' (3).

Status	Supplier	Received	Value	Currency	Project	Stage	Method
Opened	ServiceRus	22/04/2013 09:37:36	35000.00	Pound Sterling (GBP)	Security Services Tender	ITT	Web Site
Opened	Safe & secure Uk	22/04/2013 09:30:00	37000.00	Pound Sterling (GBP)	Security Services Tender	ITT	Manual
Opened	Quality Services Ltd	19/04/2013 14:00:22	40000.00	Pound Sterling (GBP)	Security Services Tender	ITT	Web Site
Opened	DG Services Ltd	19/04/2013 13:56:07	35000.00	Pound Sterling (GBP)	Security Services Tender	ITT	Web Site

The contents of the return can be viewed by clicking ‘View Return’ (1) to view or save the documents returned. You also have the ‘Accept/Reject’ buttons again (2).

The View Return screen shows the 'Contents' tab with a list of returned documents. The 'Offer Submission Form.xls' document is highlighted with a red box.

Name	Type
Offer Submission Form.xls	Offer Submission Form
Public Liability Insurance.doc	Insurance - Public Liability
Tender Return.doc	Tender Return

In the ‘Contents’ tab, you can view all documents that the supplier has returned, including Questionnaires. If you have allowed Multiple Returns, the latest return will be in the ‘Contents’ tab and any previous return would list in the ‘Previous Submissions’ tab. You are also able to view or save the documents onto your Network if need be (by clicking on ‘Save’ or ‘Save to Zip File’).

Note: The ‘Add’ button can be used to add a document into the suppliers return. Doing so will prompt the user to explain the reason for this. (Subject to system settings)

You can accept the supplier returns individually or more commonly use the 'Accept / Reject All' button to accept all the returns at the same time. Accepted suppliers returns are the ones that are going to be evaluated; this would give a status update within In-tend for suppliers saying that their return is being considered.



(Note: If you chose the 'Accept All' option you may then choose to reject any supplier individually if and as required afterwards)

You would only 'Reject' a return that you are refusing to evaluate.
(You must have accepted supplier returns to be able to award the tender or move suppliers through to further stages)

The Returned Documents **(3)** will list all the documents returned by all suppliers. The buyer can choose to zip up any number of documents from this view by ticking the checkboxes and download the zipped file to their Network.

e-Evaluation— If you are using the system from electronic evaluation then this process can be started now. Guidance can be found within the 'Evaluation Manual'.

(Addition stages)

If this tender process has additional stages then create the next stage by going back to page 18 and repeating the process.

Please note:

Any suppliers that you wish to prevent going through to an additional stage should first have their latest submission changed to 'Rejected' by selecting 'Reject' from the latest supplier return. This will prevent them receiving any subsequent stages.

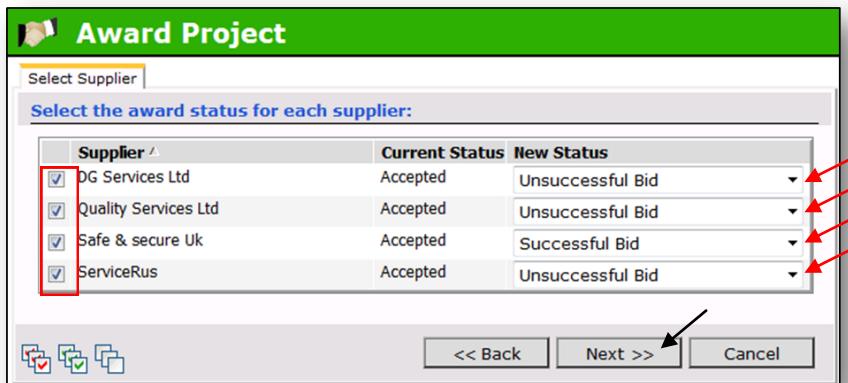
Once all returns have been evaluated, you should then complete the final step in the tender process by awarding the project. To do this you need to be in the 'Project Summary' (you must have accepted suppliers to make the '**Award Project**' link available)



Supplier Information **Users** **OJEU** **Award**

- Expressions of Interest** **Project Users** **Contract Notice, Printable Version** **Award Project**
- Attached Suppliers** **Opening Ceremony Users** **Award Notice, Printable Version** **Award History**
- Supplier Returns, Documents** **Publish OJEU Notice(s)** **Contracts**
- Correspondence, Clarifications** **OJEU Contract Notice Publish Details**
- Additional Information Notices**

Click on '**Award Project**' and tick each supplier and assign the relevant award status from the drop down box.



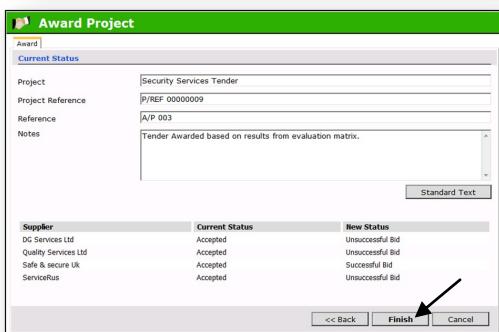
Award Project

Select Supplier

Select the award status for each supplier:

Supplier	Current Status	New Status
DG Services Ltd	Accepted	Unsuccessful Bid
Quality Services Ltd	Accepted	Unsuccessful Bid
Safe & secure Uk	Accepted	Successful Bid
ServiceRus	Accepted	Unsuccessful Bid

<< Back Next >> Cancel



Award Project

Award

Current Status

Project	Security Services Tender
Project Reference	P/REF 00000009
Reference	A/P 003
Notes	Tender Awarded based on results from evaluation matrix.

Supplier	Current Status	New Status
DG Services Ltd	Accepted	Unsuccessful Bid
Quality Services Ltd	Accepted	Unsuccessful Bid
Safe & secure Uk	Accepted	Successful Bid
ServiceRus	Accepted	Unsuccessful Bid

<< Back Finish Cancel

When awarding the project you may enter a reference number if required.

The notes section can be used (if required) to enter any notes to be held against the award. This information would be available for audit from the 'Project History' screen.

Finally check the status for each supplier is correct before committing to clicking the finish button.

The red status on the suppliers Tender Management screen will update once the project has been awarded. The message will depend upon the awarded status.

Tender Management

Unfortunately, on this occasion you have not been successful in winning this tender.

Tender ITT Correspondence History

Tender Management

Congratulations, you have been successful in winning this tender

Tender ITT Correspondence History

The suppliers do not receive any automatic notification after the award of the tender therefore correspondence should be created to inform the suppliers of the outcome of their participation of the tender process.

From 'Project Summary' select "New Project Correspondence". The status of the supplier will be visible. Select the supplier which you want to communicate with.

Project Summary

Security Services Tender

Description: P/REF 00000009

Reference: P/REF 00000009

Send standard correspondence messages: Yes

Return Date: ITT (18/05/2013 12:30:00)

Customer Name: Procurement

Project Summary | Projects | Home | Help

New Project Correspondence

Select Suppliers

Select the required suppliers from the list below:

Data Filter: By Project (All)

Supplier	Status
DG Services Ltd	Project: Unsuccessful Bid
Quality Services Ltd	Project: Unsuccessful Bid
<input checked="" type="checkbox"/> Safe & secure UK	Project: Successful Bid
ServiceRus	Project: Unsuccessful Bid

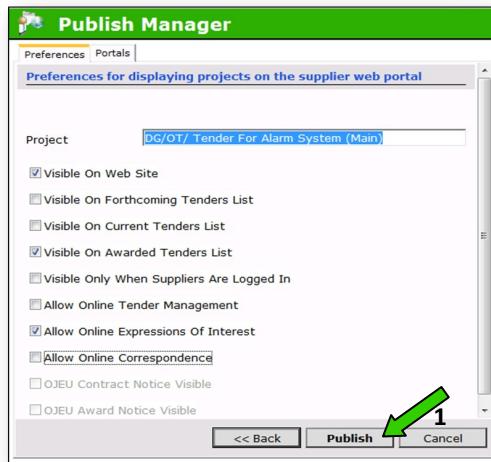
Actions

Back | Next | Cancel

More information of creating correspondence can be found on page 54

Publish Awarded Project—(Optional)

To update the supplier website with the awarded tender status you should re-publish the tender into the 'Awarded Tenders' area. To do this, you should click on '**Publish Manager**' from the 'Project Summary' view and select 'Visible on Awarded Tenders List' (1). *Please note: This simply publishes the project along with its description therefore it is recommended to edit the project description and include a statement that this has now been awarded.*



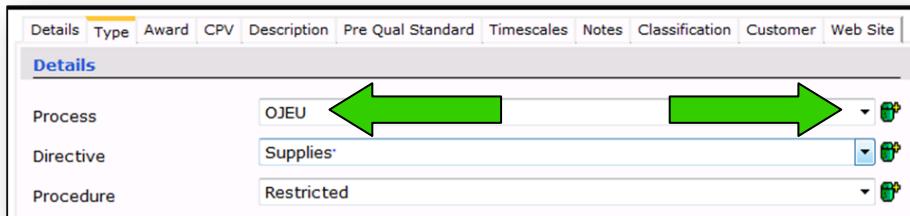
Project History

View Project History from the Project Summary window to view the full history of the tender from creation of the Project, right through to Award.

Project History				
Project Filter: DG/OT/ Tender For Alarm System (Main)				
Date	Group	Event	Stage	Details
28/11/2011 11:13:48	Details	Project Created		
28/11/2011 11:34:09	Users	Attached To Project		ADMINISTRATOR
28/11/2011 11:37:30	Stages	Stage Created	ITT	
28/11/2011 11:39:16	Stages	Stage Built	ITT	
28/11/2011 11:39:32	Details	Project Published To Web Site		
28/11/2011 11:45:32	Supplier Administration	Supplier Attached		'DG Incorporated2' Attached By 'ADMINISTRATOR'
28/11/2011 11:45:32	Publications	Stage Published	ITT	'DG Incorporated2' Via Web
28/11/2011 15:15:07	Returns	Return Received	ITT	DG Incorporated2
28/11/2011 15:48:27	Opening Ceremony	User Added To Opening Ceremony		User 'ADMINISTRATOR' added by 'ADMINISTRATOR'
28/11/2011 15:48:41	Opening Ceremony	Attempted To Start The Opening Ceremony	ITT	User logged in was 'ADMINISTRATOR'
28/11/2011 15:48:42	Opening Ceremony	Started The Opening Ceremony	ITT	Attendee(s): ADMINISTRATOR ADMINISTRATOR
28/11/2011 15:48:44	Returns	Return Opened	ITT	'ADMINISTRATOR' Open Return From 'DG Incorporated2'
28/11/2011 15:48:44	Returns	Attempted To Open Return	ITT	'ADMINISTRATOR' Attempted To Open Return From 'DG Incorporated2'
28/11/2011 15:52:56	Opening Ceremony	Suspended The Opening Ceremony	ITT	User logged in was 'ADMINISTRATOR'
28/11/2011 16:56:57	Opening Ceremony	Completed The Opening Ceremony	ITT	Attendee(s): ADMINISTRATOR ADMINISTRATOR
28/11/2011 16:57:22	Returns	Return Accepted	ITT	'ADMINISTRATOR' Accepted Return From 'DG Incorporated2'
28/11/2011 16:57:51	Award	Successful Bid		Award To 'DG Incorporated2' By 'ADMINISTRATOR'

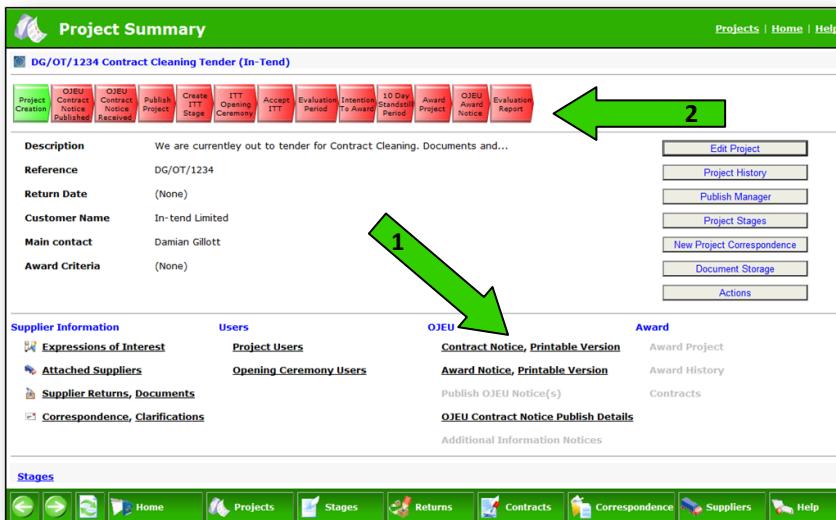
OJEU

Your OJEU notice can be completed and sent through the In-Tend Organiser. When creating a new Project you would select the OJEU Process from the Type tab.



Details	Type	Award	CPV	Description	Pre Qual Standard	Timescales	Notes	Classification	Customer	Web Site
Process	OJEU									
Directive	Supplies									
Procedure	Restricted									

When your Project has been created you can view the Project Summary screen and you will then be able to view the OJEU section. Click on the Contract Notice to complete the required information. (1)



Project Summary

DG/OT/1234 Contract Cleaning Tender (In-Tend)

Workflow Pipeline:

- Project Creation
- OJEU Contract Notice Published
- OJEU Contract Notice Drafted
- Publish Project
- Create ITT Stages
- ITT Opening Ceremony
- Accept ITT
- Evaluations Period
- Intention To Award
- 10 Day Standstill Period
- Award Project
- OJEU Award Notice
- Evaluation Report

Description: We are currently out to tender for Contract Cleaning. Documents and...

Reference: DG/OT/1234

Return Date: (None)

Customer Name: In-tend Limited

Main contact: Damian Gillott

Award Criteria: (None)

OJEU:

- [Contract Notice, Printable Version](#)
- [Award Notice, Printable Version](#)
- [OJEU Contract Notice Publish Details](#)

Supplier Information:

- [Expressions of Interest](#)
- [Attached Suppliers](#)
- [Supplier Returns, Documents](#)
- [Correspondence, Clarifications](#)

Users:

- [Project Users](#)
- [Opening Ceremony Users](#)

Award:

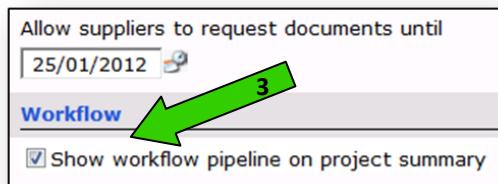
- [Award Project](#)
- [Award History](#)
- [Contracts](#)

Additional Information Notices:

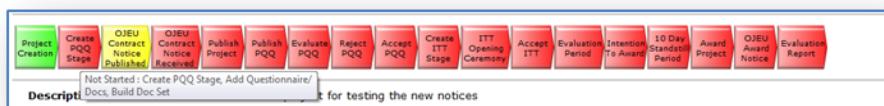
Stages:

Back, Forward, Home, Projects, Stages, Returns, Contracts, Correspondence, Suppliers, Help

The “**workflow pipeline**” (2) is a guide for taking you an OJEU tender. It will only be visible if you tick “**Show workflow pipeline on project summary**” (3) when on the “**Type**” tab on create new project. If you have already created your project then the “**workflow pipeline**” can be added by clicking “**Edit Project**” button and ticking “**Show workflow pipeline**”



The workflow pipe uses colour coding to guide you through the process. Green indicates the section of the tender is complete. Yellow indicates the particular part of the tender is in progress. Red indicates the particular part of the tender not started. You can hover your mouse over the workflow buttons to display additional information. Some buttons on the workflow such as "PQQ Stage" & "ITT Stage" for example are short cuts that may be clicked to take you onto that part of the tender.



Contract Notice

All Yellow fields are mandatory requirements. A lot of the information will be pulled through from the Project e.g. Tender Ref and Title, Description, CPV Codes, Contract Dates etc..

The information required in section I.1 can be set against the User profile and will automatically pull through (see Advanced Tendering User Guide).

The Contract Notice is a Wizard Template and you should keep clicking Next to proceed through the Wizard.

The final screen within the Contract Notice relates to a tender will several LOTS, you should press the Repeat button and you have up to 20 LOTS.

Edit OJEU Contract Notice

Section: ANNEX B: INFORMATION ABOUT LOTS

LOT No

TITLE

1) SHORT DESCRIPTION

2) COMMON PROCUREMENT VOCABULARY (CPV)

Code	Description	Supplementary Vocabulary
		Manage

3) QUANTITY OR SCOPE

Cost

If known, estimated cost excluding VAT (give figures only):

Repeat **Remove** **<< Back** **Next >>** **Finish** **Cancel**



Once you have completed all required information click on Finish.

As soon as the Contact Notice has been completed you will see in the OJEU section that the Publish OJEU Notice(S) link has become active.

Publish OJEU Notice(s)

Project Summary

DG/01/1234 Contract Cleaning Tender (In-Tend)

Project Creation	OJEU Contract Notice Published	OJEU Contract Notice Accepted	Publish Project	Create Stages	ITT Open Ceremony	Accept ITT	Evaluation Period	Intention To Award	10 Day Period	Award Project	OJEU Notice	Evaluation Report
------------------	--------------------------------	-------------------------------	-----------------	---------------	-------------------	------------	-------------------	--------------------	---------------	---------------	-------------	-------------------

Description We are currently out to tender for Contract Cleaning. Documents and...

Reference DG/01/1234

Return Date (None)

Customer Name In-tend Limited

Main contact Damian Gillott

Award Criteria (None)

Supplier Information

- Expressions of Interest
- Attached Suppliers
- Supplier Returns, Documents
- Correspondence, Clarifications

Users

- Project Users
- Opening Ceremony Users

OJEU

- Contract Notice, Printable Version
- Award Notice, Printable Version
- Publish OJEU Notice(s)**
- OJEU Contract Notice Publish Details

Award

- Award Project
- Award History
- Contracts

Additional Information Notices

Stages

By Selecting the Publish OJEU Notice(s) you will be taken to the Publication Wizard from here you are able to select whether you are publishing Project Details, Prior Information Notice, Contract Notice (1) or Award Notice

Publication Wizard

Publication

Select the type of notice to be published.

Project Details
 Prior Information Notice (PIN)
 Contract Notice
 Award Notice

1

2

<< Back **Next >>** **Cancel**

The official OJEU publishing email address is built into the system, click Next (2) for it to give a summary page of what is about to be published, once you are happy with the details click Publish. The Contact Notice will be sent and a confirmation email will later be sent to you.

Publish Manager

Preferences Portals | Preferences for displaying projects on the supplier web portal

Project: DG/OT/1234 Contract Cleaning Tender (In-Tend)

Visible On Web Site
 Visible On Forthcoming Tenders List
 Visible On Current Tenders List
 Visible On Awarded Tenders List
 Visible Only When Suppliers Are Logged In
 Allow Online Tender Management
 Allow Online Expressions Of Interest
 Allow Online Correspondence
 OJEU Contract Notice Visible 
 OJEU Award Notice Visible

[<< Back](#) [Publish](#) [Cancel](#)

When you are ready to Publish your Project to your In-Tend e-Tendering portal you would go through Publish Manager as always, for OJEU Project you have the option to attached a copy of the Contract Notice with the Project advert.

You will see the OJEU symbol against any OJEU Projects in the Project Administration view. You can also see whether or not the OJEU Contract Notice has been published, there will be a Green tick in the Published to OJEU column when it has been sent.

Project Administration

Project Templates | Home | Help | 

Data Filter: Show All

Search for: dg in Title [Search](#) [Clear Search](#) [Advanced...](#)

Title	Reference	Next Return Date	Published to OJEU	Awarded
DG/Tender for IT Equipment	DG/T/002	30/11/2011		
DG/A/Supply of Fresh Fruit Auction)	DG/Eval001	30/11/2011		
DG/MC/Portable Appliance Testing	DG Mini Comp 001			
DG/OT/ Tender for Alarm System		15/12/2011		
DG/OT/ Tender for Alarm System (Main)	DG/OT/009	28/12/2011		
DG/OT/1234 Contract Cleaning Tender (In-Tend)	DG/OT/1234			
DG/OT/Security Services	DG/OT/009	30/11/2011		
DG/QQ/Memory Sticks	DG QQ			

Showing 1 to 9 of 9

[Project Summary](#) [Project History](#) [Add Project](#) [Edit Project](#) [Project Award Criteria](#) [Reports](#) [Actions](#) [Document Storage](#) [Close](#)

Clarifications

Clarifications can be found in two places

1. 'Project Summary' view, within the 'Supplier Information' area to link correspondence to the overall project

2. 'Stage Summary' view to link correspondence to a stage.

In Clarifications you are able to post amendments to a project/stage. Organiser users can create new Clarifications with the "Internal" option selected initially, so that Clarifications are not published to suppliers straightaway.

The user can build up their clarification text over a number of sessions before publication. Publication is effectively made when the "Internal" option is changed to either "Public" or "Private" (1). The name of the clarification must be unique per project.

Internal -Only Organiser users can view. No suppliers can view the Clarification.

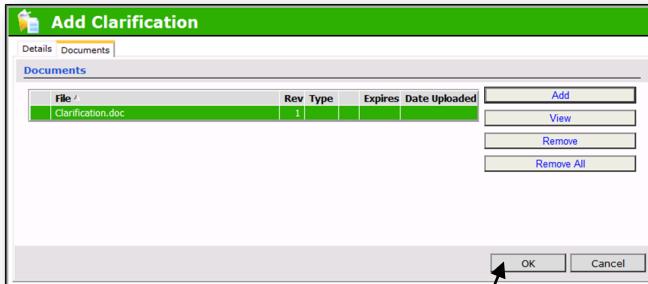
Private - Only those suppliers who are attached to the project and/or stage can view the Clarification; suppliers must be logged into the secure area of the system before they are able to view. Suppliers will get an email alerting them of the Clarification. If a supplier is already attached to a project or expresses their interest in a project after the clarification has been sent they will still receive an email alert informing them that there have been clarifications and to log into the secure area to view.

Public- All suppliers can see them - whether logged in or logged out, attached to project or not.

The Project title and reference will automatically pull through if the clarification is linked to a particular stage. Choose the stage from the drop down list.

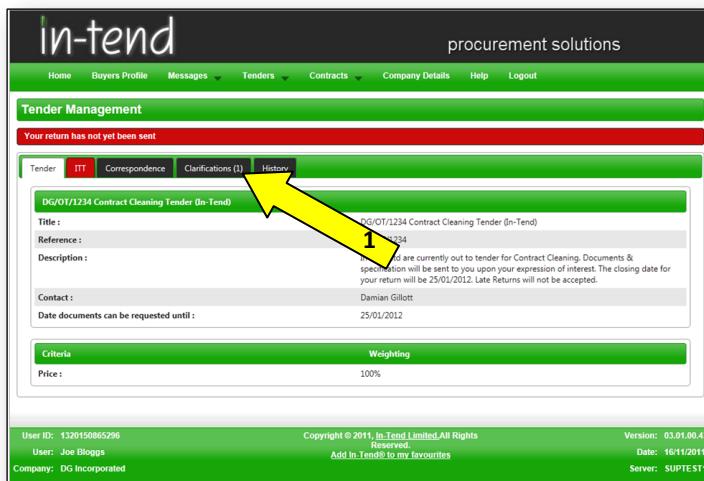
You also have the option to add a file attachment to a clarification.

To attach documentation to the clarification click on the Documents tab and click 'ADD'. You will be able to add multiple documents.



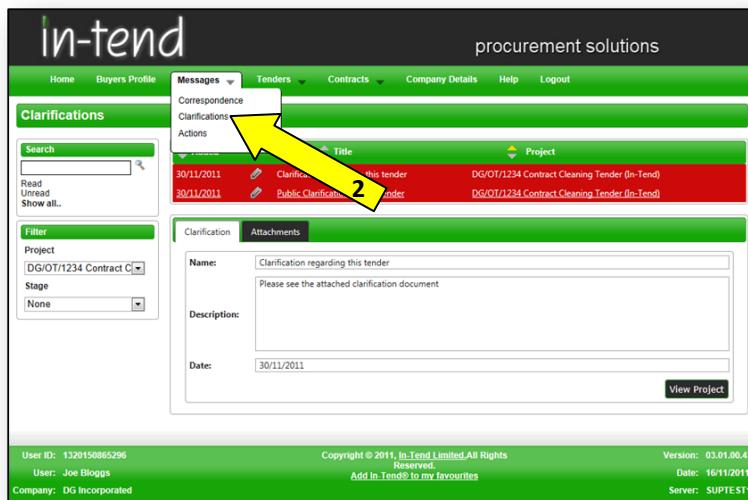
Ensure you have chosen the correct option as to who you want to be able to view the clarification. If it's 'Public' or 'Private' the Clarification will be available to view on the supplier portal as soon as 'OK' is pressed.

For suppliers any public Clarifications can be viewed from going through 'Current Tenders', locating the tender of interest and clicking on 'Tender Details'.



The screenshot shows the 'Tender Management' section of the In-Tend website. A yellow arrow points to the 'Clarifications (1)' tab in the top navigation bar. The main content area displays a tender titled 'DG/01/1234 Contract Cleaning Tender (In-Tend)'. The tender details include a title, reference number, description, contact information, and a document request section. Below the tender details is a table for 'Criteria' and 'Weighting'. At the bottom of the page, there is footer information with User ID, Company, Copyright, and Version details.

If the Clarification has been made Private, the supplier must be logged into the secure area of the website and be attached to the tender. They would be able to view the Clarification by clicking on '**My Tenders**', view tender details any clarifications will be indicated in the '**Clarification**' tab (1). Alternatively you can click on the '**Clarifications**' from the '**Messages**' tab (2). This will view clarifications from all projects.



The screenshot shows the 'Messages' section of the In-Tend website. A yellow arrow points to the 'Clarifications' tab in the top navigation bar. The main content area displays a list of clarifications for a specific tender. One clarification is shown in detail, with tabs for 'Clarification' and 'Attachments'. The detail view includes fields for Name, Description, and Date. At the bottom of the page, there is footer information with User ID, Company, Copyright, and Version details.

Correspondence- Communication with the suppliers

There is a function called Correspondence within In-tend which offers you the ability to send a communication to your suppliers and still have the Audit trail recorded within the system.

Correspondence created from '**Project summary**' will list all suppliers connected to the project. (Tip: If used after the tender award this will show the suppliers 'Successful' or 'Unsuccessful' status).

Correspondence from '**Stage Summary**' will list all the suppliers connected to the stage. This will also allow filtering to "Stage accepted" & "Stage Rejected"

Correspondence associated with Project

Click on the 'New Project Correspondence' link located at the right hand side within the Project Summary or the 'Correspondence' link found below 'Supplier Information' on the same page.

Within the 'Correspondence' page you will be presented with any previous communication with suppliers. You can also filter the correspondence by project or stage using the search facility. We are in the correct area, so to create a correspondence we shall click the '**Create New Correspondence**' link on the right-hand side. You will now be presented with a list of the suppliers linked to the project (which can also be filtered). Select the recipients from the list by placing a tick in the box/boxes, or click the Select All icon in the bottom left corner if the correspondence is to be sent to everyone listed (suppliers are blind copied (Bcc) so they are unaware of the other suppliers involved in the process). Then click the '**Next**' button.

Select the delivery method of the correspondence by selecting one of the following radio buttons:

'E-mail', 'Telephone', 'Fax', 'Letter' or 'Web'

It will automatically default to the Web option, which will send an automated email to the supplier informing them that they have received a Correspondence and will give them the link to the supplier website to login and view it. By sending the Correspondence via the web it means that the supplier can reply to the message and the audit log stays recorded within the system.

The image shows two overlapping windows from a software application. The left window, titled 'New Project Correspondence', has a green header and a 'Select Suppliers' tab. It displays a list of suppliers with checkboxes and their project status. The right window, titled 'Create New Correspondence', has a green header and a 'Details' tab. It asks 'How is this message being sent?' with radio buttons for E-mail, Telephone, Fax, Letter, Web, Outgoing, and Incoming. The 'Outgoing' option is selected.

You can select if the message is outgoing or incoming if the message is being sent via Email, Telephone, Fax or Letter, however it will be disabled if your chosen method is via Web and be defaulted to Outgoing.

Date: The date defaults to today's date when the correspondence is created. The date field is enabled for Telephone, Fax or letters. Use the calendar control to change the date. The date field is disabled if your chosen method is e-mail or web.

Subject: In the 'Subject' field, enter the subject of the correspondence.

Reference A reference number can be assigned to the correspondence. The reference will be repeated throughout the thread. Reference numbers can be searched for using the 'Advanced' function from Correspondence Trail.

Message: Type the message in the Message field. If you have Standard Text relating to your correspondence which you wish to use then click on the '**Standard Text**' button and select from the list the text you want to insert into your correspondence. Click '**Next**'.

Attachments Tab

If you wish to attach documents to your correspondence, this step of the wizard allows you to browse your network or PC for documents to attach. Click the '**Add**' button to browse for documents you wish to attach.

Click on the '**Next**' button.

You will now see the summary for your correspondence, which will also confirm any attachments to the recipients. Check that all the details are correct and, when you are satisfied, click '**Next**' to finish. The correspondence will be delivered by your chosen method to the selected recipients.

New Project Correspondence

Message Details | Recipients | Attachments | **Distribution Details**

E-mail Telephone Fax Letter Web
 Outgoing Incoming

Date: 03/05/2013

Associated With

Associated With Project : Security Services Tender - P/REF 00000009

Subject

Tender Award

Reference: A/0124

Message

Dear Supplier,

Thank you for taking part in this tender process.

We are pleased to tell you that your company has been successful in winning this tender. You will receive a purchase order in due course alongside any further information as required.

Buttons: << Back | Next >> | Cancel

Hint: The recipients tab can be used to verify the supplier(s) that will receive the correspondence.

Correspondence View

The correspondence that has been sent will list individually against each supplier. If you click on '**View Correspondence**' you can see what was sent, you can also view the History (select 'History' tab) where you are able to view if the supplier has read the message and the individual within the organisation that has viewed the message.

Project Summary

In_community | Projects | Home | Help

Security Services Tender

Description	P/REF 00000009	Edit Project																				
Reference	P/REF 00000009	Project History																				
Send standard correspondence messages	Yes	Publish Manager																				
Return Date	18/05/2013 12:30:00	Project Stages																				
Customer Name	Procurement	New Project Correspondence																				
Main contact	Damian Gillott	Request Document																				
Award Criteria	(None)	Document Storage																				
		Actions																				
Final Award Value																						
<table border="1"> <thead> <tr> <th>Supplier Information</th> <th>Users</th> <th>OJEU</th> <th>Award</th> </tr> </thead> <tbody> <tr> <td>Expressions of Interest</td> <td>Project Users, Project Groups</td> <td>Contract Notice, Printable Version</td> <td>Award Project</td> </tr> <tr> <td>Attached Suppliers</td> <td>Opening Ceremony Users</td> <td>Award Notice, Printable Version</td> <td>Award History</td> </tr> <tr> <td>Supplier Returns, Documents</td> <td></td> <td>Publish OJEU Notice(+)</td> <td>Contracts</td> </tr> <tr> <td>Correspondence, Clarifications, Correspondence Trail</td> <td></td> <td>OJEU Contract Notice Publish Details</td> <td></td> </tr> </tbody> </table>			Supplier Information	Users	OJEU	Award	Expressions of Interest	Project Users, Project Groups	Contract Notice, Printable Version	Award Project	Attached Suppliers	Opening Ceremony Users	Award Notice, Printable Version	Award History	Supplier Returns, Documents		Publish OJEU Notice(+)	Contracts	Correspondence, Clarifications, Correspondence Trail		OJEU Contract Notice Publish Details	
Supplier Information	Users	OJEU	Award																			
Expressions of Interest	Project Users, Project Groups	Contract Notice, Printable Version	Award Project																			
Attached Suppliers	Opening Ceremony Users	Award Notice, Printable Version	Award History																			
Supplier Returns, Documents		Publish OJEU Notice(+)	Contracts																			
Correspondence, Clarifications, Correspondence Trail		OJEU Contract Notice Publish Details																				

All the correspondence messages for this project can be seen in the screen shot below. The 'Read' column indicates how many times a correspondence message has been viewed. "0" indicating the message has not been read yet.

Correspondence

Filter: Tender for IT Services
Data Filter: Show All

Search for [] in [] To [] [Search](#) [Clear Search](#) [Advanced](#)

To	Subject	Reference	Date	Associated With	From	Read
DG Services Ltd	Contractual Documents	A/0124	03/05/2013 13:54	Project : Tender for IT Services	Damian Gillott	0
DG Services Ltd	Award Letter	A/0124	26/04/2013 11:07	Project : Tender for IT Services	Damian Gillott	0
DG Services Ltd	Tender Award	A/0124	26/04/2013 11:09	Project : Tender for IT Services	Damian Gillott	2
	No Submission		26/04/2013 11:00	Project : Tender for IT Services	Quality Services Ltd	1
DG Services Ltd	RE: More Information		26/04/2013 10:57	Stage : ITT	Damian Gillott	0
Safe & Secure UK	RE: Question		26/04/2013 10:54	Project : Tender for IT Services	Damian Gillott	0
	Question		26/04/2013 10:52	Project : Tender for IT Services	Safe & Secure UK	2
	More Information		26/04/2013 10:46	Stage : ITT	DG Services Ltd	2

Showing 1 to 8 of 8

Options: [Create New Correspondence](#) [View Correspondence](#) [Standard Correspondence](#) [Emails](#) [Reply](#) [Reply To All](#) [Actions](#) [Close](#)

Home Projects Stages Returns Contracts Correspondence Suppliers Help

To view the correspondence and any attachments click the "View Correspondence" button.

View Correspondence

Details Attachments (4) Thread History

Details

From: [Damian Gillott](#)
To: DG Services Ltd
Date: 03/05/2013 13:54

Associated With

Project : Tender for IT Services

Subject

Contractual Documents
Reference: [\[\]](#)
(This Correspondence Has 4 Attachment(s))

Message

Please review the attached documents which you are requested to download, sign and return to us within the time specified.
Kind Regards

[Reply](#) [Reply To All](#) [Close](#)

Viewing the message gives access to:

'Attachments' Tab—
Containing any attached documents.

'Thread Tab'— Contains thread links for viewing replies etc

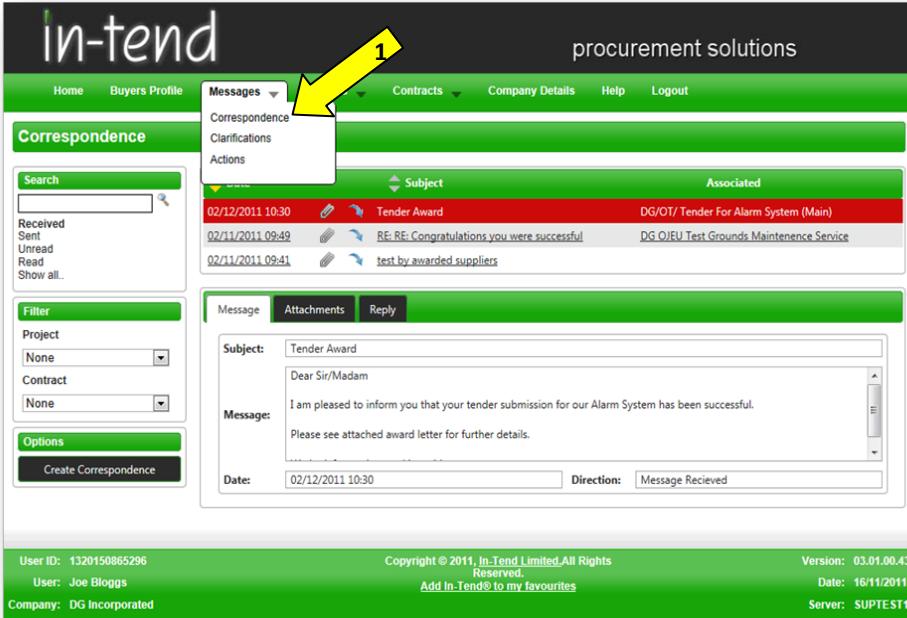
'History Tab'— Contains the audit information. This will display the date & time the correspondence was read and by whom.

When the correspondence contains any file attachments this will be shown as in the link in the screen shot above.

Clicking the link is a shortcut to accessing the attachments.

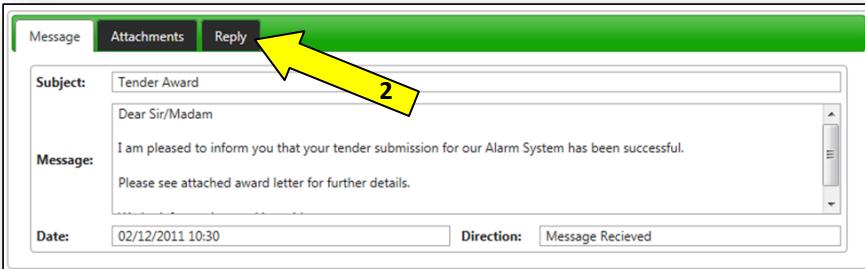
View Suppliers Correspondence

When the supplier logs into the secure area of the website, they would see a message in Red on the homepage informing them that they have unread correspondence. They can either click on the link or click on the '**Correspondence**' link from the '**messages tab**' at the top of your screen (1).



The screenshot shows the In-Tend procurement solutions homepage. At the top, there is a navigation bar with links for Home, Buyers Profile, Correspondence, Contracts, Company Details, Help, and Logout. The 'Correspondence' link is highlighted with a yellow arrow labeled '1'. Below the navigation bar is a search bar and a sidebar with filters for Project (None), Contract (None), and Options (Create Correspondence). The main content area displays a list of messages with columns for Subject and Associated. The first message is titled 'Tender Award' and is associated with 'DG/OT/ Tender For Alarm System (Main)'. The second message is titled 'RE: RE: Congratulations you were successful' and is associated with 'DG O/EU Test Grounds Maintenance Service'. The third message is titled 'test by awarded suppliers'. At the bottom of the page, there is footer information including User ID, User, Company, Copyright, Version, Date, and Server details.

The supplier can view the correspondence and any attachments, they can also reply to the message (2).



The screenshot shows a detailed view of a message. The message subject is 'Tender Award' and the message body starts with 'Dear Sir/Madam'. The message content continues with 'I am pleased to inform you that your tender submission for our Alarm System has been successful. Please see attached award letter for further details.' Below the message body, there are fields for Date (02/12/2011 10:30) and Direction (Message Received). At the top of the message view, there are three buttons: Message, Attachments, and Reply. The 'Reply' button is highlighted with a yellow arrow labeled '2'.

For general correspondence, roll-over '**Messages**' and then select '**New Correspondence**' from the menu at the top of the screen. You can also access this function from the Navigation bar at the bottom of the screen by clicking the '**Correspondence**' button and selecting the '**Create New Correspondence**' button to the right of the screen.

The Correspondence wizard is launched. Select one of the following radio buttons to filter the list of potential recipients:

By '**Project**', '**Stage**', '**Contract**', '**User Group**', '**Project Users**', '**Approved Supplier List**', '**Specified Business Type**' or '**Specified suppliers**'. When you've chosen your filter criteria, click the '**Next**' button.

Depending on the filter criteria chosen, you will now be presented with a list of either users or suppliers, filtered by the selections made in the previous step. Select the recipients from the list by placing a tick in the box, or click the '**Select All**' icon in the bottom left corner if the correspondence is to be sent to everyone listed. Then click the '**Next**' button.

The next steps are as stated above on pages 37 to 39.

The screenshot shows the In-Tend Organiser software interface. The top navigation bar includes 'File', 'Project', 'Stage', 'Contracts', 'Messages' (which is the active menu item, highlighted in blue), 'Administration', 'Reports', and 'Help'. Below the navigation bar, there is a 'Report Writer | Help | Site Map' link. The main content area displays various reporting and management links, including 'Contract Administration', 'View Contracts Due For Renewal', 'Key Performance Indicator Schedule', 'Auctions', and 'Project Templates'. The bottom navigation bar features icons for Home, Projects, Stages, Returns, Contracts, Correspondence, Suppliers, and Help.

Correspondence Trial

Supplier Information	Users	OJEU	Award
Expressions of Interest	Project Users, Project Groups	Contract Notice, Printable Version	Award Project
Attached Suppliers	Opening Ceremony Users	Award Notice, Printable Version	Award History
Supplier Returns, Documents		Publish OJEU Notice(s)	Contracts
Correspondence, Clarifications, Correspondence Trial		OJEU Contract Notice Publish Details	
		Additional Information Notices	
Stages			
Title	Stage Start Date	Return Date	Lock Date
	10/04/2013 09:00:00	10/05/2013 09:00:00	Not Locked

Project Correspondence Summary

[In_community](#) | [Projects](#) | [Home](#) | [Help](#)

Tender for IT Services

Description	In-Tend are currently out to tender for the provision of IT...	Advanced Search	
Reference	P/REF 00000004	Export	
Customer Name	Procurement	Edit Project	
Subject:	Award Letter	Date:	26/04/2013
Reference:	A/0124	From:	Damian Gillott
Associated With:	Project : Tender for IT Services	To:	DG Services Ltd
Please see the attached Award Letter			
Download All Attachments			
Award Letter.doc			
Subject:	Tender Award	Date:	26/04/2013
Reference:	A/0124	From:	Damian Gillott
Associated With:	Project : Tender for IT Services	To:	DG Services Ltd
Dear Supplier, Thank you for taking part in this tender process. We are pleased to tell you that your company has been successful in winning this tender. You will receive a purchase order in due course alongside any further information as required. Kind Regards Procurement			
Subject:	No Submission	Date:	26/04/2013
Associated With:	Project : Tender for IT Services	From:	Quality Services Ltd
Hi, Thank you for this opportunity but after looking through the tender specification we feel that we will not be able to meet the requirements. We would kindly like to decline from the tender process.			

The correspondence trial allows you to view an expanded view of all the correspondence for the project. Any of the headings such as Subject / Supplier name / Attached files are underlined indicating a link that can be clicked filter the correspondence.

“Export” button– Allows the data on-screen to be exported in excel.

“Advanced Search” button –This enables you to search for criteria against all correspondence fields.

Advanced Search

[Advanced Search](#)

To return multiple matches for a particular field separate them with a comma. e.g. “derby,leicester”. Any empty fields will not be included in your search.

Please specify how different fields should be combined to perform your search.

All fields must match Any fields can match

Criteria

Search for	in	Subject
Search for	in	Message
Search for	in	Reference

[OK](#) [Cancel](#)

Questionnaires

Electronic questionnaires can be saved within the system for use with tendering / Contract Management KPI's and auctions. This example will create a tendering questionnaire. (*Please note: These are different to e-Evaluation questionnaires that require users to log in and score the responses. More information on e-Evaluation can be found in the e-Evaluation User Manual*).

From the top menu, roll-over 'Administration' then 'Questionnaires' and select 'Questionnaires' from the drop-down menu.

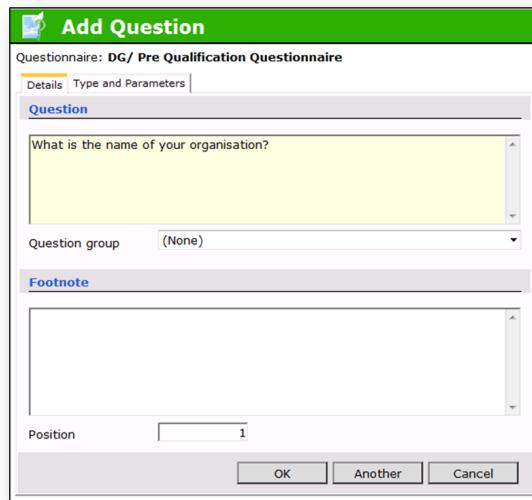
To create a questionnaire, select 'Add Questionnaire' from the right side menu (1).

Name	Description	Actions	Score Sheets
DG/ITT Questionnaire	To be used with all ITT tenders	6	0
DG/PQQ Questionnaire	Please answer all the following questions	6	0
DG/Supplier Registration Form	To be used on all new supplier registrations	6	0

In the Create New Questionnaire window, complete the information that is required regarding the Title and Description (please note that the information entered here will be visible to suppliers completing the questionnaire). In the 'Available For' section, tick the radio button that indicates it is a 'Tendering' Questionnaire (the others are required for other modules). Ticking '**Allow all users to use this questionnaire**' will determine which users can access it. Next, click on the 'Header and Footer' tab to enter information that will appear at the top and the bottom of your questionnaire. ('KPI Schedule' tab relates to the Contract Management module and the 'Groups' tab also determines who can view the questionnaire, but is unnecessary at this stage)

Once the fields in the 'New Questionnaire' window have been completed click '**OK**'. The 'Questionnaire' view is opened and your new questionnaire is displayed in the list.

To add questions to the new questionnaire, highlight the questionnaire in the Questionnaires list and click the '**Add Questions**' button located on the right hand side. In the 'Questions' window click on the '**Add Question**' button to start adding questions to your questionnaire. Note: '**Question Wizard**' will allow you to select any questions previously entered onto other questionnaires.



Type your question in the 'Question' field. This field is mandatory. The '**OK**' button will only be enabled when an entry has been made in this field. Type the text you wish to appear as a footnote to your question. Leave this field blank if no footnote is required. (Example **Question:** Do you have insurance cover to the value of £5million – **Footnote:** You may be asked to provide the documentation at a later date)

The Question Groups can be used for two reasons:

- 1. Weightings:** You need to assign each question into a Question Group if you wish to assign weightings to your questionnaire.
- 2. Users:** When setting up users you can allow them to have viewing rights to certain groups, so rather than a user viewing the whole questionnaire and suppliers answers they may only have the right to an individual Group i.e. Technical Questions.

Next, click on the 'Type and Parameters' tab. In this section you can determine how you wish your suppliers to answer the question.

Questionnaire: Pre Qualification Questionnaire

Details **Type and Parameters**

Type

Simple text Memo Selection Description

Mandatory

Parameters

Alpha/Numeric Numeric (whole) Numeric (rational)

Width chars

Simple Text: Can have either an alphanumeric or a numeric parameter. You can change the default width setting as required.

Memo: Allows for an extended reply. You can change the default width and height settings as required. You are also able to set the maximum length of text a supplier can enter into the box. ("‐1") Sets the length of text to unlimited.

Parameters

Width chars

Height chars

Maximum length chars

Selection: Invites suppliers to choose answers that are either Single Selection or Multiple Selection answers.

There are pre-defined choices or alternatively you can add your own options by pressing the 'Add' button and inputting each of your relevant answers.

Parameters

Single Select Multiple Select

Predefined

Description

Description (Type): This acts as a heading on your questionnaire. In the 'Question' tab you may type Company Details and then in the 'Types and Parameters' tab select Description. All the following questions would then relate to Company Details. There are no Parameters for a Description heading.

Mandatory: Tick this check box to make the answering of this question mandatory. If ticked, the supplier will be unable to submit the questionnaire without answering this question.

When you have completed your question, setting the required type and parameters, click '**OK**' to save and return to the Questionnaires view. Alternatively, click on the '**Another**' button to save the current question and create a new one without leaving the 'Add Question' window.

When you have entered the questions, click the Preview button to view the questionnaire. The questionnaire can be previewed at any point during and after its creation. If you want to amend a question, click on the '**Edit Question**' button. Please note that, at present, the system will not allow you to change the Question Type once it has been selected. To change the Type, the question will have to be removed using the Remove Button and entered again. The sequence of questions can be altered by clicking on the '**Move Up**' or '**Move Down**' buttons. Once you are happy with all the questions, click '**Close**' to take you back to the Questionnaires screen.

To look at the questionnaire as it would be viewed by the supplier then you may click the '**Preview**' button.

Questionnaire

Question Summary

6	in total
0	answered
6	mandatory unanswered

Unanswered Mandatory Questions

- Question 1
- Question 2
- Question 3
- Question 4
- Question 5

[Go To Mandatory Question](#)

DG/ Pre Qualification Questionnaire

To be used for all PQQ stages.

Please note: yellow denotes mandatory question

1. What is the name of your organisation?

2. How many employees work for your organisation?

1 to 10
 11 to 25
 26 to 50
 50 and above

3. Please indicate your Public Liability Cover

£1,000,000
 £3,000,000
 £5,000,000
 £10,000,000

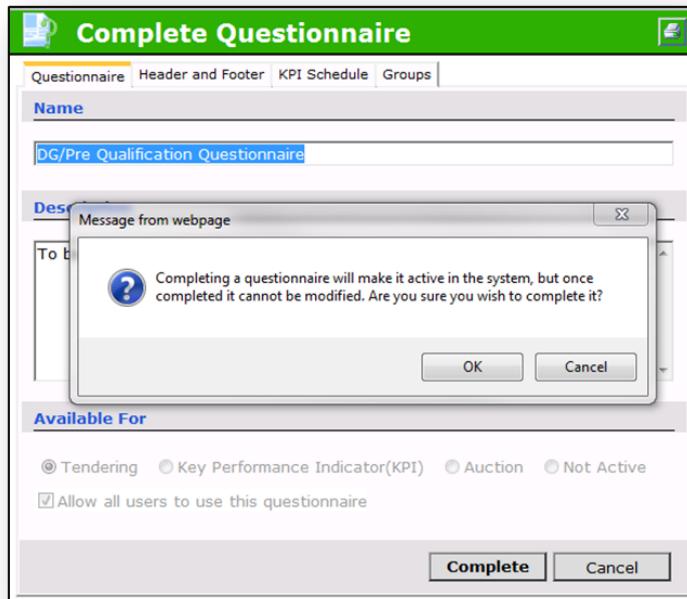
4. How many years has your organisation been trading?

5. Please give a summary of your business

6. Do you hold any of the following accreditations?

ISO 9001
 ISO 1400
 CHAS
 CONSTRUCTION LINE

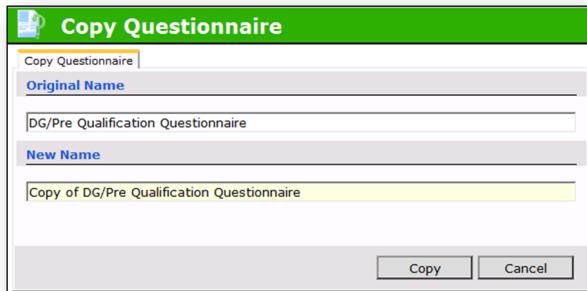
When you are happy that the questionnaire is finished and correct, click the '**Complete**' button. Completing a questionnaire makes it active in the system, at which point you are able to create a score sheet if required and also link it to a tender stage. Once the questionnaire is completed it cannot be modified, if you do wish to modify it, you must copy the questionnaire in full and then edit the copy. The original should be made in-active (from the questionnaire view click on the '**Details**' button at the right hand side and click '**Not Active**' – you will then not be able to attach it to a tender stage).



Copy Questionnaire

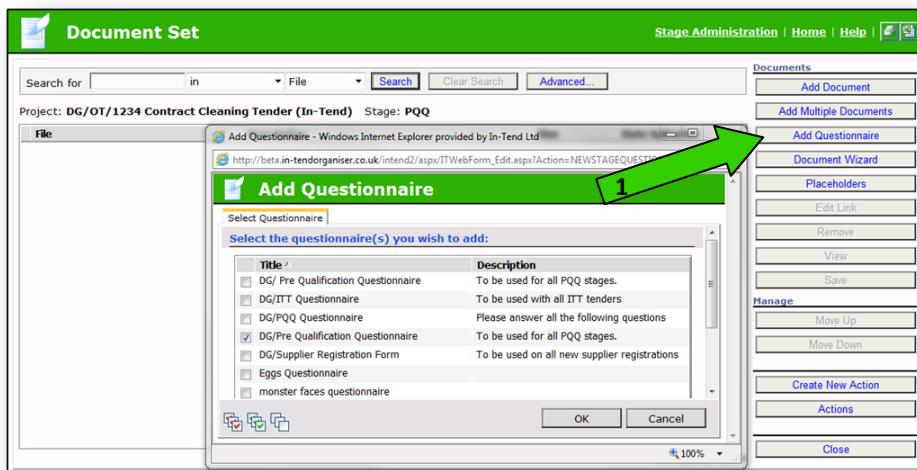
Click once on the questionnaire you wish to copy and click on the '**Copy Questionnaire**' button situated to the right of the screen in the Manage list.

Specify a new name for the copied questionnaire and click '**Copy**'.



The copied questionnaire will appear in the questionnaires window in a format which can then be modified.

To link the Questionnaire to a tender stage, from the 'Document Set' view, select '**Add Questionnaires**' (1) from options down the right hand side. This will provide you with a list of all the active tendering questionnaires in the system. Tick the check box alongside the questionnaire and then click '**OK**'. This will then pull the questionnaire through to your document set



Once you have attached the Questionnaire to the Document Set you are able to add any other documents that you may wish to send out with the PQQ stage. You should finally Build Document Set as before.

When the supplier makes their PQQ response the Questionnaire will be a mandatory requirement, they must complete all mandatory questions and complete the questionnaire before they are able to make their return.

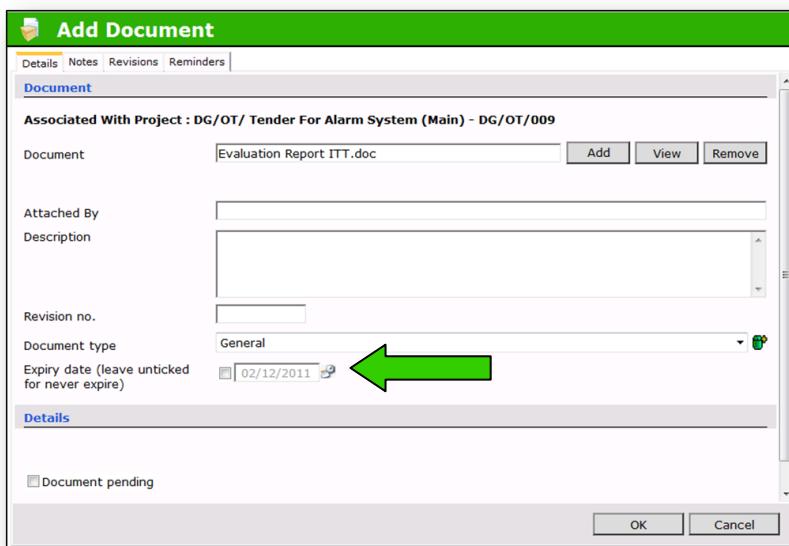
When the return comes back into the Organiser you can view as before in the Returns Administration section. You must Run Assessment (this can either be done by click on the View Return button within the Returns Administration if you are automatically opening the returns or within the Opening Ceremony by clicking on the Manage button, both screens are exactly the same, click on the Contents tab highlight the Questionnaire and Run Assessment. This must be done for every return).

Document Storage—Project Level

Document Storage is within the Project Summary at the right hand side. The idea of Document Storage is that you can upload any other documents you have connected to the tender which are not already in the system, Evaluation Report, Purchase Order, copy of signed Contract etc



You can click on Add Multiple Documents if you wish to upload more than one document at any one time or you click on Add Document where you can input further detail regarding the document, as well as entering expiry dates where appropriate which can then trigger reminders regarding the expiry.



Document: Click on the Add button to browse and locate the document you wish to upload.

Attached By: The Attached By field will automatically populate the details of the person logged in.

Description: You can add a description to the document if you wish.

Revision no.: If you have multiple revisions of a document, rather than adding a new document each time instead you would **Add Revision** in this field it will tell you how many revisions there are against this document.

Document Type: By clicking on the drop down list you can select the document type for this document.

Expiry date: If the document expires you enter its expiry date, you will receive emailed reminders regarding the expiry date which you can set in the **Reminders** tab.

If you tick the Document Pending box you are able to enter a description of the document which will be required, this creates a placeholder in document storage. EG. At the beginning of the tender process you may go into Document Storage and set a document pending for Evaluation Report, Purchase Order etc, then at the end of the process you would highlight the placeholder and **Add Revision** to pull through the actual document.

The screenshot shows the 'Document Storage' interface. At the top, there is a green header bar with the title 'Document Storage' and navigation links for 'Home | Help |' and a user icon. Below the header is a search bar with fields for 'Data Filter: Show All', 'Associated With Project: DG/OT/ Tender For Alarm System (Main) ...', 'Search for', 'in', 'File', 'Search', 'Clear Search', and 'Advanced...'. To the right of the search bar is a sidebar with a 'Documents' section containing buttons for 'Add Document', 'Add Multiple Documents', and 'Document Wizard'. Further down the sidebar are buttons for 'Details', 'Add Revision', 'Remove', 'View', 'Save', 'Move Up', and 'Move Down'. The main content area displays a table of documents. The table has columns: 'File /', 'Publish', 'Rev', 'Description', 'Type', 'Expires', and 'Date Uploaded'. One row is visible, showing 'Evaluation Report.ITT.doc', 'Internal', '1', '1', 'Copy of Evaluation report with all associated scores and comments.', 'General', and '02/12/2011'.

Actions

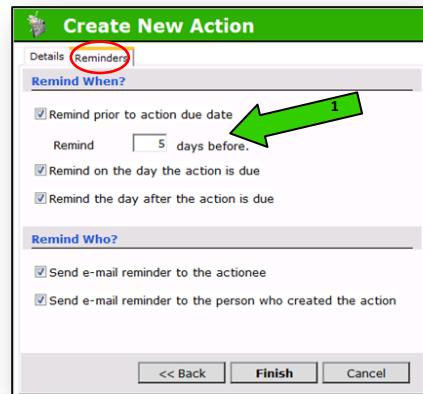
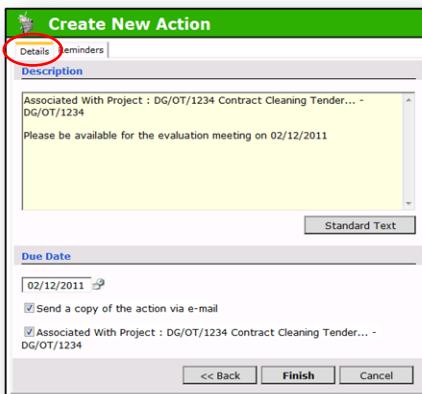
You are able to set Actions against Users, Groups and Suppliers which will trigger email reminders when the action is due.

To create an Action associated to a Project go into the Project Summary and at the right and side click **Actions**.

Step 1:

In the Create New Action window, select whether you want to attach the action to a user, group, all users in a group or by supplier / supplier contact, by clicking on one of the radio buttons. You can place an action on all users in a group or just one person in a group. Click the Next Button.

If you have selected to place an action on a user or a supplier, go to Step 3



Step 2:

If you have selected By Group or All Users in a Group, the next screen will list all the groups that have been set up in the system. Check the box next to the group you wish to send an action to and Click the Next button.

Step 3: Select which user(s) / supplier(s) you wish to place an action on by checking the box next to their name. Click Next

If you select by supplier you can select which individual contact to send to on the next screen, before entering a description. Click the Next button. In the Description field, type in a description of the action. This field is mandatory.

Step 4: In the Due Date field, select a date when the action must be completed by. This field defaults to today's date.

If you wish for a copy of the action to be sent to the actionee by email, ensure that the check box 'Send a copy of the action via email' is ticked.

Click on the Reminders tab. Change the settings here to reflect your preferences. (1)

Click the Finish button to accept the action.

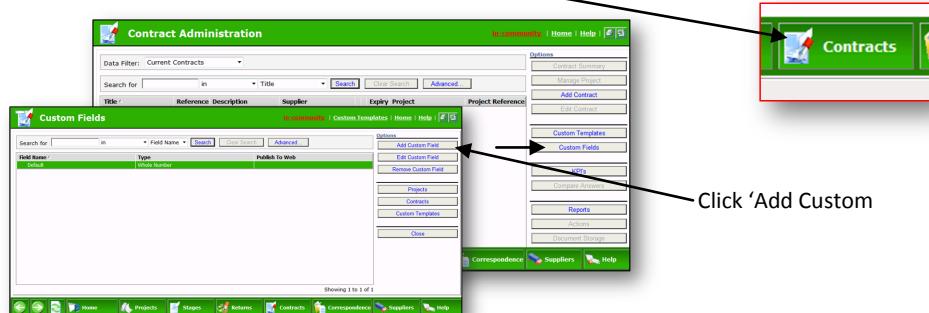
Actions							
Data Filter:		Show All	Search for:	Search	Clear Search	Advanced	
<input type="checkbox"/>	<input type="checkbox"/>	My Outstanding Actions					
<input type="checkbox"/>	<input type="checkbox"/>	Outstanding Actions (Raised By Me)					
<input type="checkbox"/>	<input type="checkbox"/>	Outstanding Actions (All)					
<input type="checkbox"/>	<input type="checkbox"/>	Completed Actions					
<input type="checkbox"/>	<input type="checkbox"/>	Messages					
		Enterprises	Contract : Supply of Desktop PCs - Extensive	28/10/2011	28/10/2011	ADMINISTRATOR	Contract : Supply of Desktop PCs
		ADMINISTRATOR	Testing Description.	31/10/2011		ADMINISTRATOR	2
		ADMINISTRATOR	Testing Message 31/10/2011			ADMINISTRATOR	0
		ADMINISTRATOR	KPI Instance : Contract 2 - Contract 2 - Budget-Spend Information - District 9...	01/11/2011	01/11/2011	ADMINISTRATOR	KPI Instance : Contract 2 - Budget-Spend Information (11/01/2011)
		ADMINISTRATOR	KPI Instance : Re-Surfacing of Road 16C - Re-Surfacing of Road 16C - Budget-Spend...	01/11/2011	01/11/2011	ADMINISTRATOR	KPI Instance : Re-Surfacing of Road 16C - Budget-Spend...
		ADMINISTRATOR	Associated With Supplier Return : S_QVALUES4_15.XML	01/11/2011	01/11/2011	ADMINISTRATOR	Supplier Return : Eval 2 Supplier 2 - QVALUES4_16.XML
		ADMINISTRATOR	Standard terms and conditions here ...			ADMINISTRATOR	0
		ADMINISTRATOR	KPI Instance : Another Good Company - 3 Year Cleaning Contract - Monthly Meet...	02/11/2011		ADMINISTRATOR	KPI Instance : Another Good Company - 3 Year Cleaning Contract - Monthly Meet...
		ADMINISTRATOR	KPI Instance : Another Good Company - 3 Year Cleaning Contract - Monthly Meet...	02/12/2011		ADMINISTRATOR	KPI Instance : Another Good Company - 3 Year Cleaning Contract - Monthly Meet...
Showing 1 to 20 of 35							

Where the Supplier Messages come through at the bottom of the screen there is also a tab for Actions. If you click on the Actions tab you can see Actions which are

Supplier Messages Actions				
	Due Date	Description	Who	Raised By
	02/12/2011	Associated With Project : DG/OT/1224.Contract Cleaning.Tender... - DG/OT/1234 Please be available for the evaluation meeting on 02/12/2011	Damian Gillott	ADMINISTRATOR

Project Templates

To create a template to be used when creating a project we first need to create the fields to assign to the template. Navigate to 'Contract Administration' and select custom fields.



This example will create a field to enter the final awarded value of a tender

Field Name= The name of the field onscreen

Description= Can be used to give additional information about the field. The description does not show onscreen when using the field.

Suffix=This can be used to give information on how the field should be used

Mandatory=Makes the field mandatory. The project would not be able to be saved until the field has been filled in.

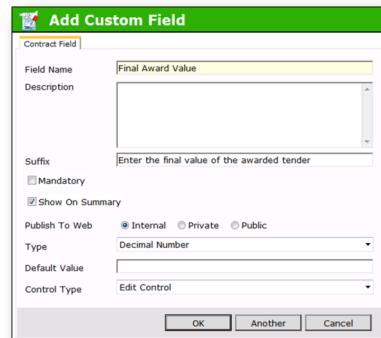
Show on Summary=Show information from the field within the project summary screen.

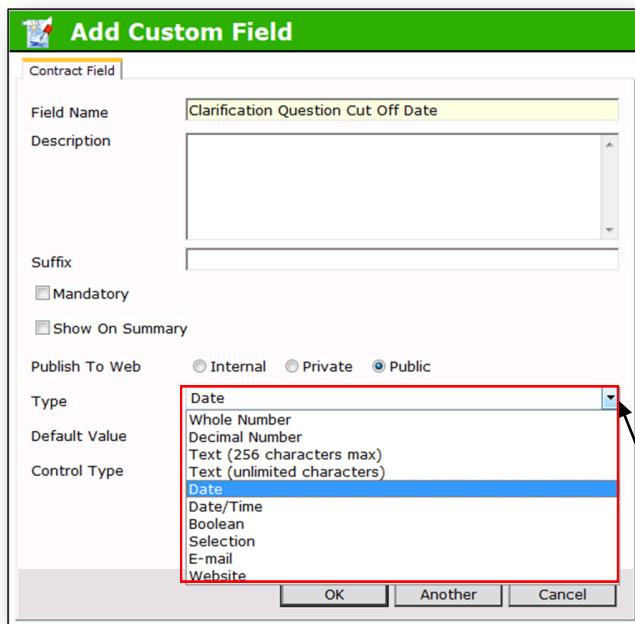
Publish To Web= (Internal) means the field will only be used for internal purposes only. Ideal for using with report writer and custom reporting. (Private) means the field will be visible on the supplier portal ONLY to suppliers that are logged into the secure area. (Public) means the field will be visible to anybody looking at the project on the supplier portal.

Type=Specifies the format for the information to be entered against the field (Addition Info next page)

Default Value=Denotes the fields defaulted value before user enters information or makes selection.

Edit Control= Only available on a "Selection" for selecting radio buttons or drop down list





When creating a custom field we can use the type selection to determine in what format the field will be answered. The following types are available:

Whole number = User must input a numeric character

Decimal Number = User must input a numeric character (shown with decimal place)

Text (256 Characters max) = User can enter field information on a single line limited to 256 characters.

Text (unlimited characters) = User can enter field information with unlimited characters into a memo style box.

Date = User must select from the date format

Date/Time = User must select from date & time format

Boolean = User is presented with a radio button against the field name for selection

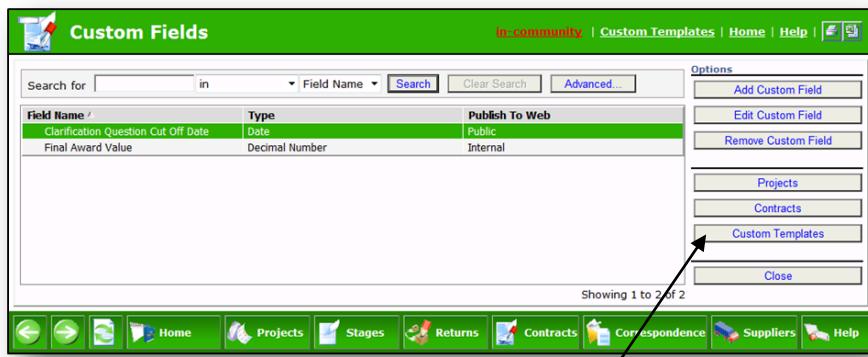
Selection = User can create options for the user to select (more info on next page)

Email = User can enter an email address

Website = User can enter a website address

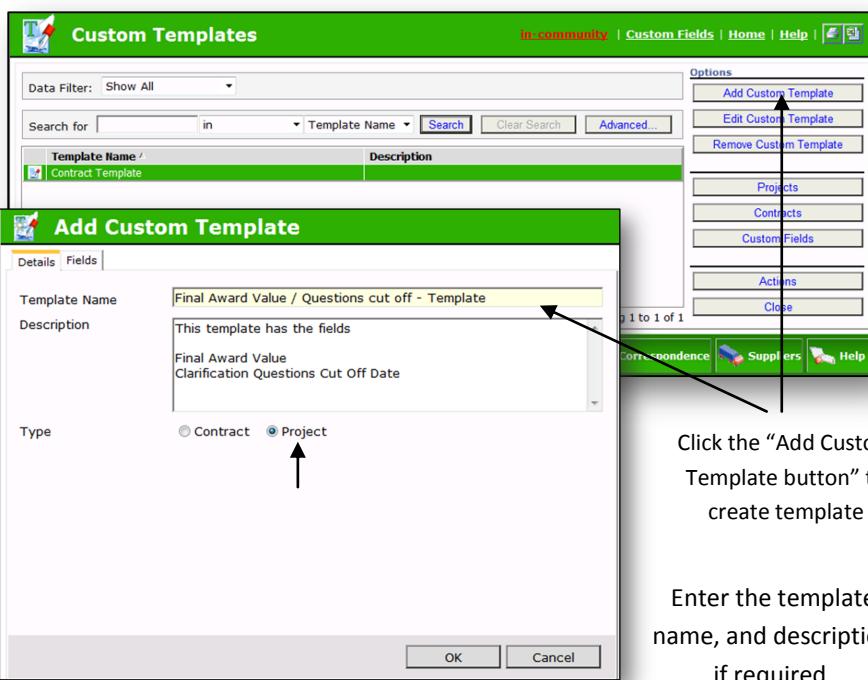
The custom fields that have just been created will be listed in the screen as shown below. Notice that each field's 'publish to web' setting is shown on screen and denotes the fields visibility when used on a published project.

Note: Custom fields can be used on both projects & contracts.



The screenshot shows the 'Custom Fields' screen. At the top, there are search and advanced search buttons. Below is a table with columns: Field Name, Type, and Publish To Web. Two rows are visible: 'Clarification Question Cut Off Date' (Date, Public) and 'Final Award Value' (Decimal Number, Internal). On the right, a sidebar has 'Custom Templates' highlighted with a red arrow. The bottom navigation bar includes links for Home, Projects, Stages, Returns, Contracts, Correspondence, Suppliers, and Help.

Now we have the fields we can create a custom template. Select the "Custom Templates" button.



The screenshot shows the 'Custom Templates' screen. The 'Add Custom Template' dialog box is open in the foreground. It has tabs for 'Details' and 'Fields'. The 'Details' tab is selected, showing 'Template Name' as 'Final Award Value / Questions cut off - Template', 'Description' as 'This template has the fields Final Award Value, Clarification Questions Cut Off Date', and 'Type' as 'Project' (radio button selected). A red arrow points to the 'Project' radio button. In the background, the 'Custom Templates' sidebar is visible with 'Add Custom Template' highlighted with a red arrow. A text box on the right says: 'Click the "Add Custom Template" button to create template'. Another text box at the bottom right says: 'Enter the template name, and description if required.'

Next, select the fields tab and click the “Add” button.

Add Custom Template

Details Fields

Field Name	Type	Publish To Web
Clarification Question Cut Off Date	Date	Public
Final Award Value	Decimal Number	Internal

Add Custom Template Fields

Fields

Select the fields you wish to be on the template. You can edit individual field properties once they have been add to the template.

Field Name	Type	Publish To Web
Clarification Question Cut Off Date	Date	Public
Final Award Value	Decimal Number	Internal

OK Cancel

Tick the custom fields to be used and select OK

If required the order of the fields can be changed to suit using the “Move Up” / “Move Down” button. Click “OK” to finish creating the template.

Add Custom Template

Details Fields

Field Name	Type	Publish To Web
Clarification Question Cut Off Date	Date	Public
Final Award Value	Decimal Number	Internal

OK Cancel

Move Up Move Down

The screen below shows how the fields are pulled through into a project when selecting the template we just created

New Project

Details Type Award CPV Description Pre Qual Standard Timescales Notes Template Details Classification Customer Website

Template

Final Award Value / Questions cut off - Template

Final Award Value

Clarification Question Cut Off Date

Enter the final value of the awarded tender

17/04/2013

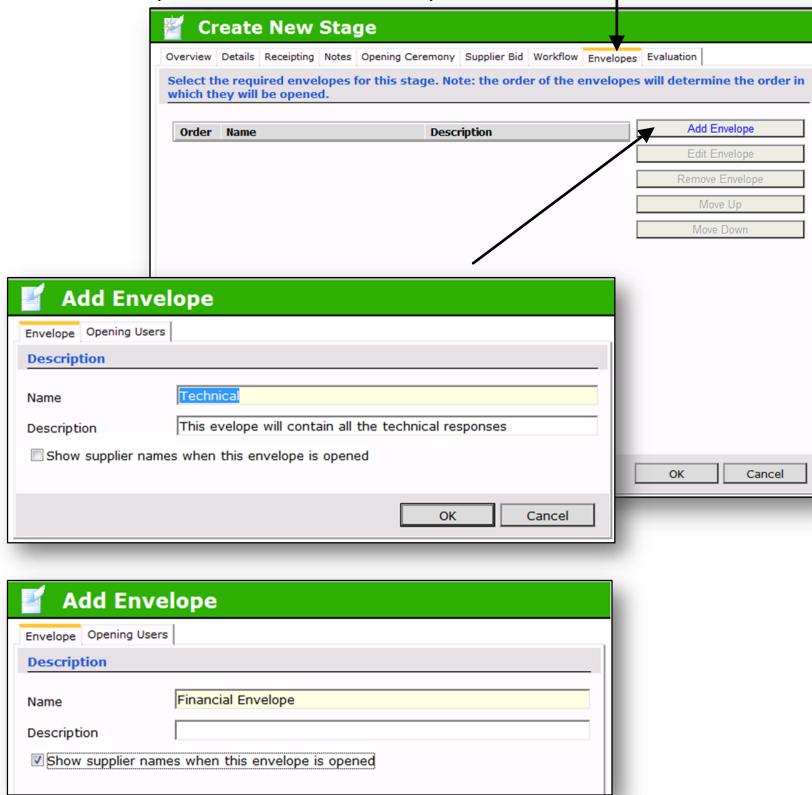
OK Cancel

Multiple Envelope tendering

When using multiple envelopes in a tender please see the information below

Envelopes are set up when creating a stage for a tender.

On the “Envelopes tab click “Add Envelope”



Create New Stage

Overview Details Receipting Notes Opening Ceremony Supplier Bid Workflow **Envelopes** Evaluation

Select the required envelopes for this stage. Note: the order of the envelopes will determine the order in which they will be opened.

Order	Name	Description
-------	------	-------------

Add Envelope
Edit Envelope
Remove Envelope
Move Up
Move Down

Add Envelope

Envelope Opening Users

Description

Name **Technical**
Description This envelope will contain all the technical responses
 Show supplier names when this envelope is opened

OK Cancel

Add Envelope

Envelope Opening Users

Description

Name **Financial Envelope**
Description
 Show supplier names when this envelope is opened

When creating the envelopes assign the “name” and add a description if required. The tick box can be used if the supplier names need to be displayed after the opening of this envelope.

Using the “Opening Users” tab select the users that are required to enter their passwords when opening of this envelope.

Overview Details Receiving Notes Opening Ceremony Supplier Bid Workflow Auction **Envelopes** Evaluation

Select the required envelopes for this stage. Note: the order of the envelopes will determine the order in which they will be opened.

Order	Name	Description
1	Technical Envelope	
2	Financial Envelope	

Add Envelope
 Edit Envelope
 Remove Envelope
 Move Up
 Move Down

Once envelopes have been created for the stage ,placeholders need to be created to assign document uploads against the relevant envelopes.

In the document set for the stage click “Add Placeholder”

Document Set

Project: DG/UN Cleaning Services Stage: Request for Proposal

File	Description	Envelope	Size	Date Uploaded
Letter of invitation.docx	1		10 kB	09/11/2012
Definition of proposal.docx	2		10 kB	09/11/2012
Information.docx	3		10 kB	09/11/2012
Offer Submission Form.docx	4		10 kB	09/11/2012

Add Document Placeholder

Document Placeholder

Description

Description Please upload your technical proposal

This document must be included in the return

Envelope **Technical Envelope**

Document Type General

Allow suppliers to upload non-placeholder documents when using placeholders

Add Document Placeholder

Document Placeholder

Description

Description Please upload your offer submission form

This document must be included in the return

Envelope Financial Envelope

Document Type Offer Submission Form

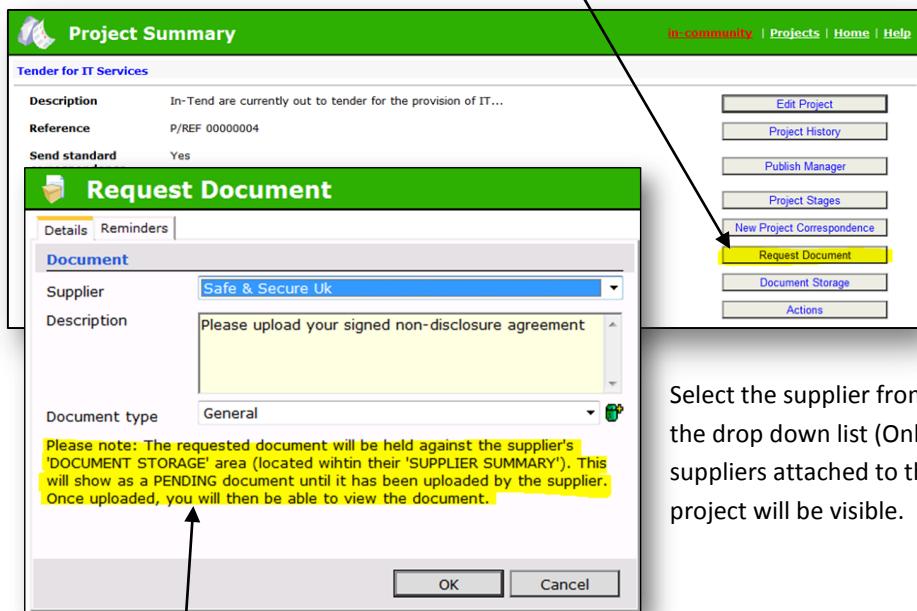
Allow suppliers to upload non-placeholder documents when using placeholders

OK Cancel

When you create the placeholder you must allocate the envelope that the returned document will be uploaded to. Note: The envelopes are not shown to the suppliers on the submission screen and will upload all documents as a single submission. The envelopes are an internal function for the buyer.

Request Document Button

The “Request Document” button can be used to create a quick instruction for a supplier to upload a specific document. This appears as an i link on the supplier home screen that a document is pending. “Request Document” button is available in different areas of the system



The screenshot shows the 'Project Summary' screen for a project titled 'Tender for IT Services'. The 'Actions' menu on the right includes a 'Request Document' button, which is highlighted with a yellow box and an arrow pointing to it from the text below. The 'Request Document' dialog box is open in the foreground, showing fields for 'Supplier' (set to 'Safe & Secure Uk'), 'Description' ('Please upload your signed non-disclosure agreement'), and 'Document type' ('General'). A note at the bottom of the dialog box states: 'Please note: The requested document will be held against the supplier's 'DOCUMENT STORAGE' area (located within their 'SUPPLIER SUMMARY'). This will show as a PENDING document until it has been uploaded by the supplier. Once uploaded, you will then be able to view the document.' The 'OK' and 'Cancel' buttons are at the bottom of the dialog.

Select the supplier from the drop down list (Only suppliers attached to the project will be visible).

When the supplier uploads the document it can be found in the suppliers company document storage area. The message onscreen reminds the buyer where the document can be found.



The screenshot shows the 'Beta-Manuals' supplier home screen. The top navigation bar includes 'Home', 'Buyers Profiles', 'Messages', 'Tenders', 'Contracts', 'Company Details', 'Help', and 'Logout'. The 'Logout' button is highlighted with a yellow box and an arrow pointing to it from the text below. The main content area displays a message: 'Welcome to the secure area of the web site' and 'You currently have:'. Below this, a list states: '2 pieces of unread correspondence' and '1 documents awaiting upload'. The '1 documents awaiting upload' link is highlighted with a yellow box and an arrow pointing to it from the text below.

The supplier can see a link ‘1 documents awaiting upload’ from the supplier home screen.

The supplier can see the instruction of what has been requested along with a red upload button.

Accessing the requested Document

To access the requested document you need to be in the supplier summary screen and select "Document Storage"

FLOWCHARTS

Single Stage Tender

- **Create New Project**

- Select Project Administration - Add Project

- **Create ITT Stage**

- From Project Summary select Project Stages - Add ITT Stage

- **Add Document Set**

- From Stage Summary select Document Set - Add Tender Documents / Add any placeholders

- **Evaluation Setup (Skip This part if not using the e-evaluation module)**

- From Stage summary select Evaluation Set Up - Create or copy evaluation questions

- **Build Document Set**

- From Stage Summary

- **Publish Project to Supplier site**

- From Project Summary select Publish Manager

- **Accept Expressions of Interest and Publish Document Set**

- From Project Summary select Expressions of Interest (This step may be skipped if you have set the system to "Automatically Accept Expression of Interest" & "Automatically Publish")

- **Run Opening Ceremony**

- From Project Summary select Supplier Returns

- **Accept supplier returns for evaluation**

- From Returns Administration select Accept/Reject All (Then click "Accept All" button)

- **Evaluate Tender Returns**

- **Award Tender**

- From Project Summary select Award Project -"Successful" & "Unsuccessful Bid"

- **Correspondence to Suppliers**

- From Project Summary select "New Project Correspondence"

- Create the correspondence for "Successful" & "Unsuccessful suppliers"

Multiple Stage Tender

Stage One



Multiple Stage Tender

Stage Two



Closed Tender



Notes

Notes

Notes



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